

The co-viewing
connection **p37**

Taking a temperature read of
the co-pro scene in China **p84**

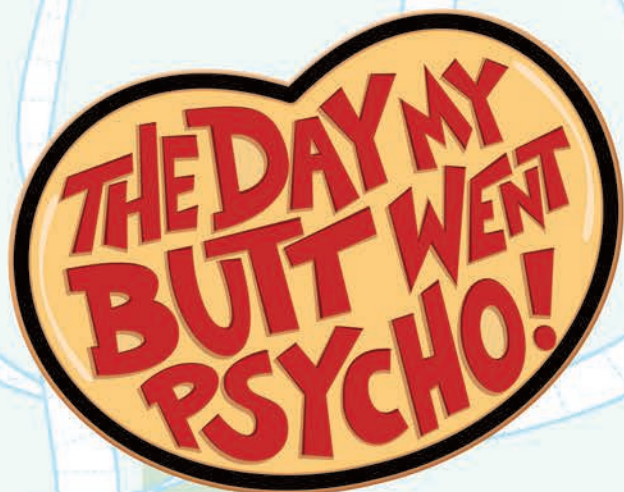
Brand Licensing—Exploring supply-side
pressure in the licensed product chain **p104**



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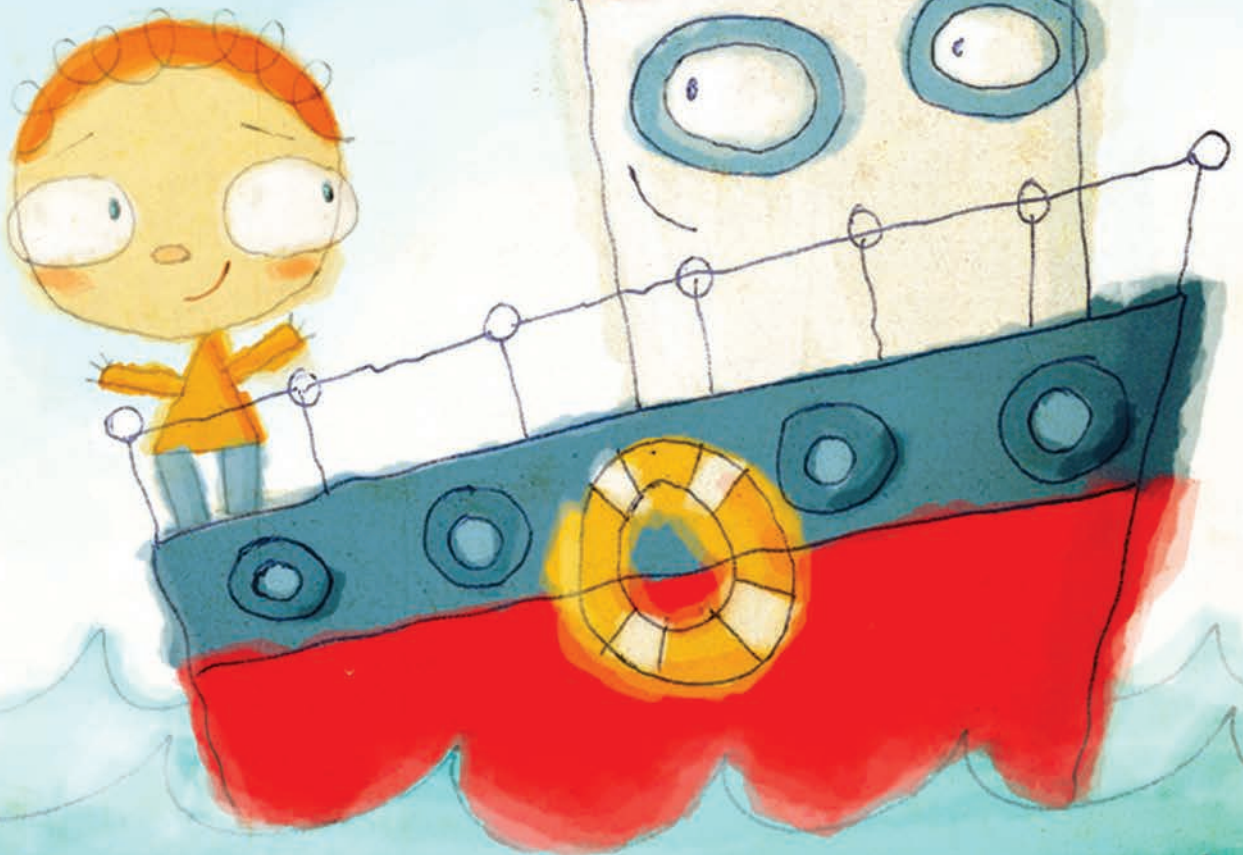
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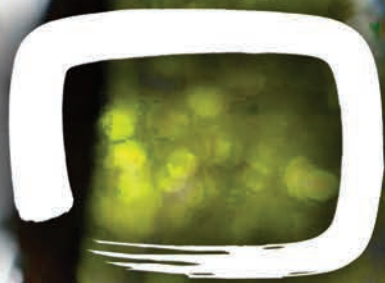
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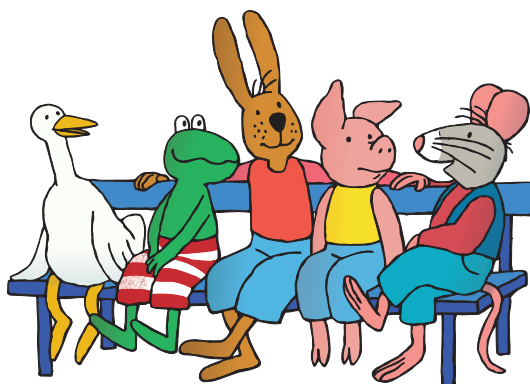
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kidscreenInside

October 2013

moves 21

Marjorie Cohn dishes on her priorities as DreamWorks' first head of TV

HotStuff—Sybo Games rides a wave of success with game app *Subway Surfers*

tv 37

Exploring the co-viewing connection

TuningIn—The Hub taps into spooky programming to boost original slate

consumer products 59

Nickelodeon revamps its Consumer Products division

Licensee Lowdown—L.A.-based beverage maker innovates low-cal licensed drinks

kid insight 75

How parents and kids are negotiating tech playtime

Kaleidoscope—Nick looks at the ways toys and tech are competing for kids' attention

iKids 81

As TV and licensing beckon, apps are just the beginning for mobile developers

New Kid in Town—Startup Tryout.net aims to connect kids and talent scouts



Nerd Corps' first preschool series *Kate & Mim-Mim* gets ready for consumer products take off at BLE

Special Reports

MIPCOM

Taking a temperature read of the co-pro landscape in China; Making multiplatform maneuvers **p84**

Brand Licensing

Examining supply-side pressure in the licensor-licensee-retailer chain; Hot properties bowing at BLE **p104**



44 AAS 2012 project *Wonderballs!* gets greenlit



48 Tricon Kids & Family launches with *Wildernuts*



66 CNE unveils Adventure Time Princess line

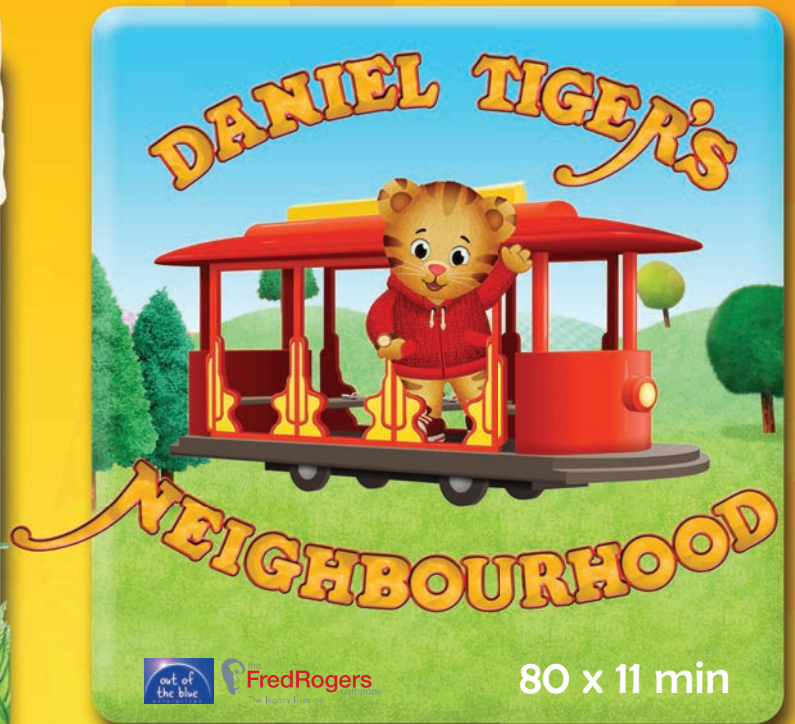


70 Global Pursuit takes Dr. Seuss to China



82 A Google exec designs board game for kids

Cover Our cover features an ad for Nelvana Enterprises' new animated series *The Day My Butt Went Psycho*, while our inside editorial cover sports an image from new Irish studio Wiggleywoo's first series, *The Day Henry Met?*



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It's a smaller and smaller world

The word global gets thrown around a lot as a descriptor for this industry. Even *Kidscreen's* tagline is "Engaging the global children's entertainment business." And while we do endeavor to live up to that promise, as well as hope that we are engaging, if not beguiling (can a magazine bat its eyelashes?), the adjective global has never been more appropriate than it is right now.



International co-productions are standard operating procedure when it comes to getting kids TV series made, along with shipping animation service work to all points of the world, particularly to Asia and Southeast Asia. And on the consumer products side, as Western mass market retailers continue to push for lower prices, goods manufactured for that market are by-and-large made elsewhere, namely China for hard goods like toys and electronics, while India and Bangladesh supply a lot of apparel. Toys and apparel are arguably the two largest categories for any given character

licensing program, so the kids industry on the licensing side is just as deeply entrenched in this global landscape as its content counterpart.

But recently, as Senior Writer Gary Rusak's excellent feature in this issue ("Under Pressure," p. 104) points out, it's the licensing side of the business that's been feeling the heat on the heels of the Rana Plaza factory collapse in Bangladesh in late April. The disaster turned a very bright spotlight on the conditions in the country's apparel factories, and prompted Disney Consumer Products, among others, to remove operations from Bangladesh. Thanks to the 24/7 news cycle and now ubiquitous presence of social media, the public outcry demanding that the brands and retailers involved take some responsibility reached a fevered pitch. It also underscored just how important it is for licensors of all stripes to pay attention to every bit of the supply chain—one faulty link can tarnish a reputation and image that it took years to build. As Gary goes on to write, though, everyone in the kids business has something to learn from how the toy industry has been approaching working conditions, largely in China, since 2004.

The International Council of Toy Industries Care Process has worked over the past decade to improve toy manufacturing conditions and reduce working hours with measurable success. What it took to implement, however, was the collective will of the industry and an investment of cold, hard cash. Toy industry veteran Jay Foreman estimates that adhering to the ICTI Care Process can cost as much as 3% of the price of the product being manufactured, but admits that it's nothing compared to the potential human toll taken by an unregulated workplace. So as the kids entertainment world keeps getting smaller in terms of how stuff—be it toys or toons—gets made, it's worth noting that the scope of public scrutiny is only getting broader.

Cheers,

Lana

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What is it?

Neither a market nor a conference, the Asian Animation Summit program will feature presentations of new kids TV concepts from Australia, Korea, Malaysia and Thailand that are in early stages of financing and development.

Sign up and take a first look at projects that have been carefully selected based on their global-market potential and quality—any one of them could be the industry's next big hit.

Where & when?

AAS 2013 is set to take place from December 9 to 11 in Phuket, Thailand. The event has been optimally timed to run right after Asia Television Forum (December 3-6), with a weekend in between for travel from Singapore.

Our venue is the Hilton Phuket Arcadia Resort & Spa on Karon Beach, a tropical paradise famous for its beautiful 5km stretch of white sand, big turquoise waves and spectacular sunsets. Set in lush, tropical gardens surrounded by mountains and waterfalls, this five-star hotel has five swimming pools, an award-winning spa and plenty of restaurants & bars to choose from—basically, you won't ever want to go home!



Who will be there?

The first-ever Asian Animation Summit attracted nearly 300 attendees to Kuala Lumpur, Malaysia in December 2012, and we're anticipating at least 350 delegates will take part this year. The event is designed to appeal to producers of animation who are interested in co-producing projects with Asian partners, as well as broadcasters, distributors and investors from Asia and elsewhere.

What's new this year?

We've expanded our program by a full day this year, and will be running project presentations consecutively. So no need to pick & choose between screenings—you'll get to see each and every concept that makes it into our showcase. We'll also be kicking off each day of the event with a highly informative "Regional Funding Seminar" that explores the intricacies and benefits of setting up co-productions in Australia, Malaysia and Korea. Take part in all three of these critical learning sessions and get a top-to-bottom understanding of where the funding is in Asia for Kids programming, and how you can tap into it with the right partners.

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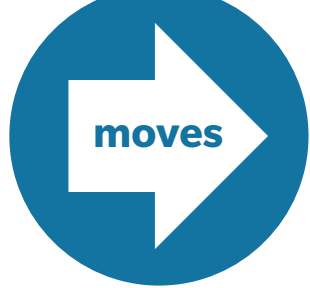
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The List

Five things on our radar this month



1 Gender neutrality taking the toy aisle?

What started last Christmas with the release of a gender-neutral toy catalogue from Swedish Toys 'R' Us retail licensee Top-Toy Group might just be a sign of things to come in the toy aisle. Inspired by that move—and the UK-based grassroots movement Let Toys Be Toys—Toys 'R' Us in the UK has agreed to advertise its products in the same gender-neutral way. Additionally, the new 26,000-square-foot Harrods Toy Kingdom in London was designed with a gender-neutral philosophy, and specialty toy shop Hamleys removed all “boy” and “girl” signposts from its London locations last holiday season. Nothing is as permanent as change, but just how will an industry founded on serving consumer segments based on gender deal with this increasingly popular trend?



NETFLIX

2 Netflix moves to pay TV

Bucking the move to fight against SVOD providers, UK-based Virgin Media marked an industry first in September when it secured a deal to integrate Netflix into its pay-TV offerings. If the pilot project turns out to be successful, it could be a win-win for both companies. Or the deal could turn sour if Virgin's customers end up seeing more value in the low-cost SVOD service and decide to cut the cord anyway.



3 Infinity vs. Skylanders

The first numbers are in. Disney Interactive sold 400,000 Infinity units in the product's first two weeks in the US market, while first-week sales of the new toy-integrated gaming platform matched the debut of rival Activision's *Skylanders Giants* game. Admittedly, the estimated US\$30 million generated by Infinity sales in this timeframe has a long way to go to catch Skylanders' US\$1 billion-plus retail haul. But it looks like it's game on!



4 Dollars and scents

UK boy band One Direction has quickly become a global licensing powerhouse and its fame continues to grow. Just over a month since its release, Sony's 3D concert doc *One Direction: This Is Us* earned has US\$50 million worldwide and 1D just launched Our Moment, its first perfume for girls. Needless to say, it's bad news for troubled heartthrob Justin Bieber, whose once-strong perfume sales are now reportedly stinking.



5 Blurred lines

Things are getting more serious for Angry Birds. Creator Rovio Entertainment has its sights set on early education with Angry Birds Playground, which offers physical and digital learning experiences in areas of math, language and music for young kids. China will be the launching pad for the initiative, which poses new questions about what kinds of content is fit for the classroom.

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Mobile gaming's up, but consoles are holding on

It's no secret that a lot of changes—and in many cases a lack of them—are affecting the US video game industry. Sales of video game hardware, software and accessories in the US took another hit declining 19% to US\$443 million in July, the same period in which market research firm The NPD Group found teens are now spending seven hours per week gaming on mobile devices. That's a two-hour jump in just two years.

According to NPD's new study, *Kids and Gaming 2013*, the way kids ages two to 17 are gaming has shifted significantly since 2011, with many of these changes directly attributable to mobile devices. More than half (53%) of mobile device users are spending more time playing on these devices compared to last year. The proliferation of less-expensive tablets and an increase in hand-me-down phones are also helping kids gain access to these platforms more frequently.

Interestingly—and not surprisingly—kids are starting to game on mobile devices at a younger age. In 2011, the average beginner was nine years old. In 2013, that age dropped to eight, and NPD expects it to continue downward.

Desktop computers, laptops and consoles remain the top device types used for gaming, but nearly as many kids are now gaming on mobile devices as they are on consoles and computers.

Yet despite all of this heightened mobile activity, NPD analyst David Riley says the console industry is still far from threatened.

"The console market offers a gaming experience that mobile products cannot, including enhanced graphics, tight controls and immersive gameplay," he says. "And while the time that kids spend playing games on mobile has increased, there's no indication that mobile gaming is having a negative impact on consoles. In my opinion, the moderate declines in console gaming are due to the age of the current platforms."

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“And while the time kids spend playing games on mobile has increased, there’s no indication that mobile gaming is having a negative impact on consoles.”

– David Riley,
The NPD Group

Furthermore, time spent on mobile gaming isn’t necessarily correlating to a rise in dollars spent. According to another recent NPD report, *Kids and Apps*, free apps account for the majority of downloads made specifically for children, with even fewer users paying for titles compared to one year ago. Gaming apps, which were the top paid-app type in 2012, fall outside the top three in this year’s research.

Riley adds that the upcoming next-generation console launches of Sony’s PS4 and the Microsoft Xbox One this fall will give the gaming industry a much-needed boost in terms of revenue, consumer interest and playtime.

What’s nearly impossible to gauge from the numbers are the differing gaming experiences kids are having across the various devices. –Wendy Goldman Getzler



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Know your audience

By Jim Benton

Great Childhood Tragedies



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Putting dreams in motion



Ex-Nick veteran Marjorie Cohn gets down to business as DreamWorks' first head of TV

Marjorie Cohn knows a thing or two about building successful kids TV shows. During her 26 years at Nickelodeon, she helped create and produce iconic series like *SpongeBob SquarePants* and *iCarly*. Now that she's heading up the newly

revamped TV division at DreamWorks, Cohn expects her valuable industry experience will translate well to her new role. She's charged with producing new TV series based on DreamWorks' current hit franchises and future films, as well as popular IP from the DreamWorks-owned Classic Media library, for a total of 1,200 new original episodes.

Cohn took some time to chat with *Kidscreen* about growing a new team, expectations around DreamWorks' upcoming animated original series *TURBO for Netflix*, and the future of SVOD.

What opportunities are you looking forward to most in your new role?

I'm excited about growing the business from the ground up, hiring a new team, and laying the template for how things will work going forward. It's very rare that you get to build something.

DreamWorks' deal with Netflix is the biggest original content deal in the SVOD service's history. What will be the biggest challenge in creating that much new content?

There is an abundance of riches. Maybe sifting through it might be the biggest challenge. We really want to go fast, and we want to make it good—all at once. Choosing what we want to work on and then getting content up quickly is going to be the biggest challenge and the biggest pleasure.

Will you be looking for co-production partners?

We're definitely going to be looking at outside animation houses for some co-producing partners. That will be an important part of the plan.

TURBO F.A.S.T. did not meet box-office projections. How will this affect the December debut of the TURBO series on Netflix?

The summer was flooded with a lot of great properties for kids, but we think there is still plenty of time for kids to discover the movie because *TURBO F.A.S.T.* is continuing to open worldwide throughout the fall. For the series, we're concentrating on making a really great show with characters kids will love. They will still get to discover the property before December and then be drawn to the show itself.

How will you leverage your live-action experience to produce an animated slate?

At Nick, we always concentrated on quality programming with engaging characters and stories, and I think it's the same for DreamWorks. Its four-quadrant movies offer humor that resonates on more than one level, with interesting visuals, stories and characters. These elements are attractive to live-action writers, so I'm hoping to migrate some of the great kid talent that I know over to DreamWorks.

Netflix and Amazon have created new models for producing and distributing original kids content. Is SVOD the future of kids TV?

We've heard that a lot. It's certainly a great time to be a content creator. We think SVOD is a great model to serve kids. And we would be happy to be on any platform, because kids continue to go anywhere to find the shows they want.

Where will linear platforms and cable broadcasters be in 10 years?

I don't know. I'm glad I'm not one of the networks. People still seem to want to kick back and watch whatever is on cable, but it does feel like the on-demand model is going to take over. I don't know what the future will bring, but I know we're going to be making great shows that can move across any platform. —Jeremy Dickson

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Michael Carrington
directs the future of
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production pipeline

Just five months into his new remit as VP of content and production at Mattel-owned HIT Entertainment's

London-based global brands division, former Turner exec Michael Carrington hasn't needed much time to get acquainted.

"One of my first-ever script editing roles as a junior at the BBC was a *Bob the Builder* script. I knew HIT for a very long time in my previous guises," says Carrington, who now reports to Edward Catchpole, SVP of HIT Entertainment.

Carrington is busy leading the further development of the company's popular existing IP, including *Fireman Sam*, *Mike the Knight* and *Thomas & Friends*, while looking for brand-new multiplatform properties. He says his immediate goals involve transitioning some of HIT's shows from stop-frame animation to CGI, and expanding the company's digital engagement strategies.

"Now is the time to exploit new production technologies. When *Fireman Sam* moved into CGI, it got an immediate reaction from the audience. It lets us explore new levels of character emotion and humor," he says.

"We are very interested in making connections in Africa, Latin America, and like everyone else—China."

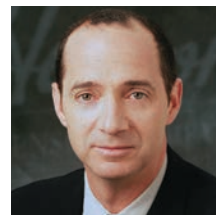
"Digital is also extremely important for the business and for how our audiences engage with our characters."

Carrington is particularly excited to grow iconic kids IP *Thomas & Friends* across platforms, as its top-rated PBS Kids series heads to the new PBS Kids video app and TV syndication on October 7.

As for sourcing new IP, he says he's unsure whether or not future acquisitions will be produced in-house or through partnerships, but HIT will continue to strengthen its relationships in emerging global territories. "We are very interested in making connections in Africa, Latin America, and like everyone else in the world—China." —Jeremy Dickson

Out of Office

Tales from the frequent fliers club



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The banner features a white cat with large eyes and a surprised expression, sitting on a red background with faint cat-related icons. A white bowl is on the ground next to the cat.



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nick jr. milkshake!

The banner shows Peppa Pig and her brother George jumping in a muddy puddle. The background is a green hill with a blue sky and white clouds.



Ben & Holly's Little Kingdom

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104 x 11'

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nick jr. milkshake!

The banner features Ben and Holly, two young characters with large heads and small bodies, standing in a grassy field. Ben is a boy with a crown and Holly is a girl with a crown. There are flowers and a ladybug in the background.

Head of International Sales

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MEDIA TOON

Booth 10.09

HotStuff



A splashy debut

Sybo Games rides a wave of success with its first game app *Subway Surfers*

Who Danish film school buddies Bodie Jahn-Mulliner and Sylvester Rishøj launched Copenhagen, Denmark-based indie game studio Sybo Games in 2010 after their animated short won took best film at the Hamburg Animation Awards in 2009. The success of the film about a young street artist escaping from a guard and his dog, led to the development of Sybo's first mobile game *Subway Surfers*, which launched on iOS and Android platforms in May 2012. Represented by Ink Brands and distributed by Kiloo Games, the free-to-play app targets kids ages eight to 14 and puts users in the roles of young street artists who must evade a railway security guard and his dog. Daily challenges and missions include running, jumping and dodging oncoming trains and obstacles, while collecting coins (in-app purchases are optional) and useful objects along the way. Since its release, the app has reached 260 million downloads worldwide, with 26 million active daily users and a 60% retention rate after 30 days, according to August 2013 stats from Flurry Analytics. Its top downloads by country for the same period (in order) are the US, China, Russia, India and the UK. The app's fast growth and visual appeal has also led to a number of consumer products licensees signing on including Isaac Morris (junior daywear, US and Canada), Coastal Amusements (coin-operated arcade games, worldwide), AME (nightwear, US), Fast Forward (bags, US) and Jellyfish (nightwear, Canada).

Why take note As the stigma around graffiti artists continues to disappear, Ink Brands' senior brand and business manager Annalisa Woods says the timing was right for a game IP based on street art to launch. "Street art is becoming more and more socially acceptable and integrated into pop culture, with the likes of Banksy really making a name for himself," she says.

"We have an Images Festival in Copenhagen, where street artists come from around the world to do street art on some of our buildings and bridges. There may still be a stigma in some markets, but we haven't received any negative reactions yet. We fully support creativity and expression."

Woods adds that the app's addictive gameplay, free monthly refreshes that feature new cities and characters, and its high-quality animation-style graphics have all helped *Subway Surfers* resonate with kids and adults, alike.

"The developers' animation skills and creative backgrounds really shine through in the IP's style guide, and that really helped us get licensees on-board," she says. "Sub-agents are now signed up in the US, Canada, the UK, the Nordics, Eastern Europe, Russia, Benelux, GAS, Australia/New Zealand, South Korea, Singapore, Malaysia and Indonesia."

What's next With global downloads on the rise, Sybo's goal is to monitor the app's success and then introduce the world to the back story of the characters. Although Woods couldn't confirm if a TV deal is in the works, Ink does see the brand eventually living outside of the digital world.

"Because it's based on a short film, there is a whole world and story behind each of the characters that you don't get to see when you're playing the app. There are many platforms that could help us keep the brand going." —Jeremy Dickson

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Florida-based Dolphin Entertainment's newly created film division, Dolphin Films, is partnering with Mattel to develop a live-action, feature-length movie based on the toyco's Max Steel brand. And former COO of MGM Studios **Charles Cohen** has been tapped to serve as president. The division is led by Dolphin Entertainment's CEO and producer Bill O'Dowd, who is producing the Max Steel movie with Mattel's Julia Pistor for a Q4 2014 launch.

Multiplatform US preschool network Sprout has a new VP of marketing in **Jennifer Giddens**. The former Turner exec will implement the Sprout's consumer and trade marketing strategy

development of linear and multiplatform programming strategy. Levine will also determine the direction of original production and oversee the development and production slates of originally produced content, acquisitions and co-productions.

In Canadian TV news, Toronto-based marbledmedia's Distribution360 has hired long-time programming and distribution exec **Caroline Tyre [A]** as director of business development. The move comes as marbledmedia continues to expand its distribution division and streamline its operations to incorporate D360 (which

platforms, the company has also hired **Martin Sieg** as its new interactive brand manager.

Meanwhile, former CTV and Corus programming exec **Joanna Webb** has joined Canada's Shaftesbury Films as SVP of content strategy. In the newly created role, she will work with senior management to align content strategies across the company's divisions, including factual, kids, sales and distribution, digital media arm Smokebomb Entertainment and the company's L.A. office. She will also pursue branded-content opportunities and distribution partnerships with third-party producers.

people



and make customized campaigns to support current and new series. Giddens will oversee Sprout's growing social media presence across platforms, and will also lead partnership and affiliate marketing, along with marketing efforts for the NBC Kids block. Giddens spent the last 10 years with Turner Networks in Atlanta.

David Levine is making the move from L.A. to London to take on a new position as VP of programming, production and strategic development for Disney Channels EMEA. Levine was previously VP and GM of Disney XD Worldwide. In his newly created role, he will oversee all strategic and operational aspects of programming across Disney Channels EMEA, including the

it fully acquired in May) into all aspects of its business. Tyre has worked in production, development, programming and distribution for more than 16 years, at companies including Teletoon, eOne, CBC and Decode Entertainment (now DHX Media). D360 has also added **Smiljka Baljovic** as a sales exec. Baljovic, who has held positions at CBC and Fireworks International, and previously served as international sales exec for the world educational market at TVO, will report to **Kirsten Hurd**, who has been upped to director of international sales and acquisitions. And as marbledmedia continues to grow content distribution on non-traditional

On the consumer products front, Massachusetts-based indie toy company Schylling Associates has been acquired by investment firms Crofton Capital and Gladstone Investment Corporation. The toy designer, licensor and distributor for such brands as Thomas & Friends and LEGO now has **Paul Weingard [B]** at its helm as president. Weingard most recently led product development at Schylling for five years and brings more than 30 years of toy industry experience to the new role. Founder Jack Schylling is assuming an advisory role focused on providing creative support. David Schylling, meanwhile, continues in a business development leadership role.

➔ For more People Moves, head over to kidscreen.com/category/people-moves

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December 3-6

Asia TV Forum
Marina Bay Sands,
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asiatvforum.com

Designed to offer market-goers the opportunity to buy, sell, finance, distribute and co-produce across all platforms, Asia TV Forum & Market (ATF) pretty much has something for everyone. It's held in conjunction with ScreenSingapore, and among the master classes offered this year is the inaugural MIPACADEMY, presented by MIPCOM and MIPTV, which is a suite of classes and workshops hosted by global production professionals.



December 9-11

Asian Animation Summit
Phuket, Thailand
asiananimationsummit.com

This annual event is designed to showcase Asia's strongest animated projects looking for investors and partners, and to stimulate co-production and co-financing of animation in the region. During three days on the island of Phuket, Thailand, participants will attend presentations of new children's TV series concepts (and some film concepts) from Australia, Korea, Malaysia and Thailand. There is also plenty of time built into the schedule for meetings, casual networking and to take in the breathtaking views and spicy Thai cuisine.



February 9-12

Kidscreen Summit
New York, New York
summit.kidscreen.com

We love February in New York. The 15th annual Kidscreen Summit will once again deliver the entertainment industry's biggest gathering of the year, attracting content creators, producers, distributors, broadcasters, digital media operatives, licensing professionals and marketers working on intellectual properties for children. Last year, more than 1,600 attendees were privy to high-level networking opportunities, insightful panel discussions and debates, inspiring keynotes and, of course, industry parties.

➔ A full listing of Industry Events is available at kidscreen.com/events

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The co-viewing connection

Meeting the viewing needs of today's tech-savvy, on-the-go kids and their busy parents has kidsnets zeroing in on shows and program strategies that provide better co-viewing opportunities in the living room and across multiple platforms

BY JEREMY DICKSON

When the cast of *High School Musical* sang the hit song “We’re All In This Together,” it wasn’t referring to kids and families coming together in living rooms to engage in quality TV time. But the tune’s universal theme of togetherness is certainly relatable to the modern family, whose members are more connected to each other than ever before. In fact, Nickelodeon Research’s 2012 study *The Family GPS: The Global Family* found that kids and parents are much closer now than in the past, thanks to new media connections and the fact that many parents consider their kids to be among their best friends.

But in today’s fast-paced, device-driven world, kids and parents are struggling to find more windows in their day to physically connect, including spending time in front of the TV. According to a 2011 study by the Cable & Telecommunications Association for Marketing (CTAM) and C+R Research entitled *Watching Gens X, Y, & i*, approximately 60% of US parents see watching TV as a means for connecting with their teens. And for younger kids and their parents, TV is still king. A 2012 study from UK-based communications regulator Ofcom on children’s media habits found the majority of UK kids ages four to 15 watch TV with adults, and that TV is the most significant media platform for the three to 11 demo. Not surprisingly, kidsnets are lining up to deliver new co-viewing experiences for their audiences, particularly in the US.

Sprout’s debut episode from season two of its hit co-view series *The Chica Show* saw a 38% ratings boost among kids two to five

tv



The Hub's *My Little Pony Friendship Is Magic* series taps into older fans' nostalgia for the original IP and the sensibilities of modern kids

Sharing moments beyond shows

One preschool network that continues to move the needle when it comes to co-viewing engagement is Sprout. Encouraging co-viewing is something Sprout has been doing since it launched in 2005 as the first 24-hour preschool network in the US and a partnership between NBCUniversal, PBS, HIT Entertainment and Sesame Workshop. Now under the Comcast/NBCU umbrella, with a reach of more than 50 million US homes and 22 consecutive months of Nielsen ratings growth with women 18 to 49, the network has carved out a unique place for itself in the kids market. It offers experiences across its linear and digital platforms that promote active engagement between parents and kids, even when the TV is switched off.

"Whether it's playing games together or being inspired to create recipes or crafts, Sprout has been really relevant with this generation of moms and preschoolers," says Sprout president Sandy Wax. "We've done a

lot of research on what's going on in the home and designed our schedule to be a tool for parents."

With a format that features original hosts and puppet characters that see kids through the various stages of the day, Wax notes that Spout's co-viewing levels are fairly consistent across the board, with time of day being the biggest driver.

"Our evening Good Night Show block is the most co-viewed because parents are home with their kids," says Wax, adding that *Pajanimals*, *Poopy Cat* and *Caillou* are some of Sprout's highest-rating co-viewed shows. For all three, 28% of kid viewers ages two to five currently watch with adults 18 to 49. Sprout's newest original series *The Chica Show* has also been a strong co-viewing contender since it bowed last year.

But Wax says linear broadcast is just one piece of the co-viewing puzzle. "You really need multiplatform as your core. You can't worry too much if your audience is on an app, or on demand, or on the linear service, because you

Co-viewing for dollars



US children's channels have limited air time for commercials each hour, so it's no surprise that competition for ad dollars is tough. "Delivering value for your clients in an ever-changing and competitive environment is the biggest challenge in ad sales, regardless of your title," says The Hub's VP of national ad sales, Nicole Cleary.

Fortunately, because more adult viewers are tuning in to The Hub throughout the day, and into primetime, it's now able to target non-endemic ad categories well outside the purview of kids.

"Clients within categories such as insurance, auto, financial services, retail, travel and tourism and packaged goods all advertise on The Hub, which helps diversify our ad portfolio and allows us to not be overly reliant on any one category," says Cleary.

She also notes that The Hub has one of the lowest commercial loads in its competitive set at just over eight minutes of national commercial time per hour.

Over at Sprout, the preschool net launched the "Made For Mom" ad sales campaign in March to more clearly articulate its own low-clutter ad space. It also underscores how its mom audience is engaged with Sprout's content and ads for retailers, packaged goods, home video entertainment, kids websites and insurance.

Sprout president Sandy Wax says the channel's sales are also benefiting from its membership in the NBCU women's portfolio. "NBCU is selling other women's platforms like Bravo, Style and Oxygen, so that's opening up some new opportunities for us," she says.

52 x 11'

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have to reach them however you can and keep them interacting with your brand.”

Leveraging social media, fan contests and advertising (see “Co-viewing for dollars,” p.39) are additional drivers for co-viewing and big reasons why Sprout has averaged the highest total-day audience of women 18 to 49 across all kidsnets for every month of 2013, according to Nielsen.

Wax points to its latest contest, Sprout’s Host Hunt, as a prime example of a way to boost audience engagement. The now-closed contest conducted an online search for a new host to join *The Sunny Side Up Show*, inviting aspiring TV personalities to submit short audition videos to Sprout.com. (At press time, the net had fielded 1,000 entries and put some of the best ones on YouTube.) Three finalists then got the opportunity to audition with Chica at Sprout’s Philadelphia studios last month.

“That philosophy of ‘We know you’re watching, do you want to be a part of it?’ is helping create a very active co-viewing experience,” adds Wax.

Audience pleasers

Over at Discovery-Hasbro’s JV cablenet The Hub, which provides programming for a much wider demo and reaches 72 million US homes, maintaining successful co-view ratings comes down to a content strategy focused on catering to parents’ nostalgia and delivering shows that resonate with today’s kids. “We continue to drive home to viewers and consumers that we are a destination for kids and families. And through consistent messaging we’re not only able to maintain our co-viewing audience, but also attract new viewers with our original programming,” says The Hub’s VP of national ad sales, Nicole Cleary.

Nielsen ratings for the current quarter found that 30% of The Hub’s 18 to 49 viewers are watching with kids ages two to 11, and the network is tops in primetime co-viewing with 36% of its adult 18 to 49 viewers tuning in with kids two to 11. The network is also appealing to a strong male co-viewing audience in primetime, with 32% of its adult male viewers 18 to 49 watching with kids.

One of its most co-viewed series is hit *My Little Pony: Friendship Is Magic*, a show that clicks with parents and adults who grew up with the original MLP property (Bronies included) and with kids’ current sensibilities.

Extensions of the brand have helped in a big way, too. The Hub’s September 1 premiere of Hasbro Studios’ original movie *My Little Pony Equestria Girls* earned triple-digit growth across numerous demos, including kids and girls two to 11, kids and girls six to 11, and adults 18 to 49. And additional shows, including *Family Game Night*, *Littlest Pet Shop*, *Pound Puppies*, *R.L. Stine’s The Haunting Hour* and *Aquabats: The Super Show*, are also co-viewing leaders, according to Cleary.

The content challenge

As Sprout and The Hub continue to grow their co-viewing numbers and compete for co-viewing audiences drawn to bigger players like Disney Channel, Nickelodeon



Original TV movie *Nicky Deuce* appealed to young Nick fans and adult fans of *The Sopranos*

and Cartoon Network, Cleary says sourcing shows that attract a broader audience can be a challenge. “Finding content that appeals to both kid and adult sensibilities is not easy to do, otherwise everyone would produce this type of content.”

For his part, producer Fernando Szew, CEO of L.A.-based MarVista Entertainment, says content creators should not try to please everyone. “Creators of shows with co-viewing potential don’t have to take the broadest approaches. Co-viewing shows should have entry points for kids and parents,” Szew says.

He refers to the 2012 MarVista/Nickelodeon co-production *Nicky Deuce* as a great example of content that hits the right touch-points for co-viewing. “Because the cast included members of *The Sopranos*, it attracted co-viewing much more than a typical kids movie would have,” he says. “After test screenings, Nick also launched an encore play for Nick at Night, which doesn’t always happen for a kids movie.”



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Spooky good fun

The Hub puts a fresh spin on nostalgic brands and gets into live-event programming

The challenge Just three years old, Discovery/Hasbro US children's net The Hub is quickly distinguishing itself as a channel with a unique, multiplatform content offering. It features animated and live-action series, specials and movies based on well-known brands (My Little Pony, Transformers, Strawberry Shortcake, R.L. Stine, Family Game Night) and brand-new original properties for kids and families. Now with a reach of more than 73 million US households, excluding its VOD channel, The Hub is starting to close the gap on the competition by bolstering its live-action production slate for primetime, growing its co-viewing audience, boosting its lineup of spooky kids shows, and making inroads into live-event programming.

The strategy The Hub hired former Disney Channel and Disney XD exec Nikki Reed in March as SVP of programming and development, tasking her with adding more live action to the cablenet's schedule. "Nikki is developing everything from reality shows to sitcoms that appeal to the whole family," says The Hub CEO and president Margaret Loesch, noting that The Hub's ratio of third-party versus original acquisitions by hours is 60/40. (Its primetime shows and movies are all acquired.) "Right now we have 20 new projects in development," she adds. "About three-quarters are live action for primetime, with some animation, and we will introduce some new shows for the development slate in 2014."

The Hub also tapped the expertise of Bob Bain Productions, the producer behind Fox's *Teen Choice Awards* and Nickelodeon's *Kids' Choice Awards*, in May to help launch The Hub Network's *First Annual Halloween Bash*. The two-hour live-to-tape tentpole event will air October 26 and feature celebrity judges, including business magnate Martha Stewart. It's not the first live programming the network has produced, but Loesch says it's the perfect fit. "We did deliver three Taylor Swift specials, which performed very well, but we were so new to live events," she admits. "Our *Halloween Bash* is exactly the type of tentpole we should be producing to celebrate the spooky genre in which we've really excelled."

The programming Coming this month to The Hub is new animated series *Sabrina: Secrets of a Teenage Witch* (Moonscoop), starring the voice talent of Ashley Tisdale (*High School Musical*). Another new half-hour original is the upcoming live-action series *Spooksville*, which is based on Christopher Pike's bestselling tween book series. The premiere date hasn't been announced, but Loesch says the acquisition extends the network's streak of successes in the under-served spooky kids genre. "I've never understood why more networks haven't served this particular space," she argues. "Kids—more so than adults—are the ones who love scary stories."

On the original movie front comes Hasbro Studios' *Transformers Prime Beast Hunters: Predacons Rising*, which sets up the next *Transformers* series and premieres October 4. Recent ratings successes include original TV movie *My Little Pony Equestria Girls* (Hasbro Studios) and brand-new animated comedy series *SheZow* (DHX Media). And Hasbro Studios' *My Little Pony Friendship Is Magic* and *Littlest Pet Shop* remain the network's two best-performing shows.

One example of a new show that didn't work for The Hub, according to Loesch, was UK adventure-fantasy series *Wizards vs Aliens* from FremantleMedia. "The show did very well in the UK, and still does, but after we launched it this summer we had to take it off very quickly," says Loesch. "We were very surprised, because we really liked the show. But because it was made for commercial TV in Britain, where there's far less commercial interruption, in order for it to fit the US commercial format we had to edit at least three to five minutes out of each episode." Loesch says the edited stories suffered from the loss of humorous, interpersonal moments between characters.

Next up In what Loesch calls the most competitive kids TV landscape ever, The Hub will continue to go after beloved brands and new IP with great stories and entertaining characters that can move across platforms and appeal to parents and kids. "Finding nostalgic brands that we can recreate remains core to our strategy." —Jeremy Dickson

New live-action series *Spooksville* is set to deliver on-screen thrills and chills to its YA-reader fanbase



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With the second edition of Kidscreen's **Asian Animation Summit** event set to take place in Phuket, Thailand from December 9 to 11, we thought it would be the perfect time to catch up on a few of the projects presented last year that are now in early production. We're gearing up to showcase another 24 brand-new kids TV concepts from Australia, Korea, Malaysia and Thailand this year—join us at the event to discover them first! More details at www.asiananimationsummit.com.



Pipeline

A sneak-peek at what's been greenlit since AAS 2012

BY LANA CASTLEMAN



kids
4 to 6

Origanimals A unique and colorful animation style sets the stage for Planet Origami, which may resemble Earth, but is a place where everything is foldable. The planet is home to our four friendly Origanimals, who are on a mission to help their fellow creatures when they are in trouble. Known as the A4 (the Awesome Four), team leader Ryan Rhino, brainy Fiona Fox, fun-loving Zoe Zebra and inventive Khye Koala go on adventures that put their problem-solving skills to the test. And by using the art of origami creatively, the A4 eventually finds a solution to help their fellow animals in need, teaching viewers some interesting animal facts along the way.

Producer Gigggle Garage (Malaysia)

Style Mixed media

Format 52 x 11 minutes

Budget US\$4.5 million

Status In production with two full episodes completed. Canadian distributor Bejuba! Entertainment is on-board and actively selling the series worldwide.

Delivery June 2015



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ZOU

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New Season
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preschool



Wonderballs! With art and music at its core, each ep of *Wonderballs!* features ball-shaped musical instruments (naturally) jumping around to a piece of music, or spherical art tools playing together. In each ep, a problem arises, and it's up to the instruments or art tools to work together to create a perfectly harmonious solution. Each time out, the balls also introduce a new art technique that children can emulate at home. Eps are divided into two parts, one featuring the animated Wonderballs and the other showing real-life kids partaking in the creative activities featured in the animated segments. Finally, the show is designed to encourage children and their parents, alike, to take the series' play and sense of fun into their own living rooms.

Producer Synergy Media, with broadcasters EBS and SK (all Korea)

Style Mixed media

Format 52 x five minutes

Budget US\$2 million

Status In production with synopses of all 52 eps completed and broadcast secured on EBS and SK's broadband channel BTv.

Delivery Spring 2015



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boys
8 to 14



Prisoner Zero With a strong graphical and fast-paced style, this sci-fi adventure series from Australia's Planet 55 Studios plays out in the tradition of the best space sagas. At its heart are reluctant teen heroes Tag and Jem, who join the Starship Rogue, which is under the leadership of the ever-mysterious Prisoner Zero and its crew—rebel Del Rev, lifelike computer Guardian, and an ancient, magical alien known only as The Librarian. This resulting ragtag band sets out on a course to fight evil planet Imperium's General Vyk and a host of spooky aliens that harken from the dawn of time.

Producer Planet 55 Studios (Australia), in association with Telegael (Ireland)

Style 2D animation

Format 26 x 24 minutes

Budget US\$7 million

Status With a commission from ABC Australia, and ABC Commercial heading up distribution, production starts this month.

Delivery May 2015



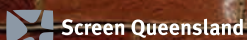
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All systems go

Tricon's new Kids & Family division is ready for liftoff



Tricon's acquisition of Kavaleer's Wildernuts kicked off its new division's ops

Three and a half years in the making, Toronto, Canada-based Tricon Films & Television officially unveiled its brand-new Kids & Family division in late August, with an announcement that it had acquired Kavaleer Productions' new animated ecology-adventure preschool series *Wildernuts*.

Joining Tricon from Portfolio Entertainment in 2010, John Rutherford was charged by Tricon president Andrea Gorfolova to grow the company's visibility in the kids space.

With hit kids talent format *The Next Star* (now in season six on Canada's YTV) headlining Tricon's kids portfolio at the time, Rutherford explains that getting the division fully off the ground took awhile because the company didn't want to launch Tricon Kids & Family until it was fully satisfied with its acquisitions decisions.

"There were a lot of catalogues that had been pitched to us, but none of them felt right, and we didn't want to push anything unless we were 100%," says Rutherford. "Internally, though, we were moving forward, creating a presence at the international markets."

Also key to the organic growth of its new division, according to Rutherford, is former Skywriter exec Ashley Rite. As Tricon's director of development and international sales, Rite is overseeing the sourcing of animation and live-action talent for both scripted and unscripted projects.

With the business falling into place, Rutherford now claims to have one of the largest distribution teams for a Canadian independent company in sales, acquisitions and business support.

"We're looking for linear and non-linear partners and are open to a lot of opportunities. We can provide gap and complete financing, which is attractive in the kids space—especially for expensive animation," he says.

Already prepped to debut at MIP Jr. alongside *Wildernuts* is a physical fitness-themed preschool live-actioner called *Jiggijump*, a Tricon acquisition from Toronto's Markle Productions.

An earlier Tricon acquisition co-produced with Mercury Filmworks and based on a popular children's book by Emily Mullock, *Go Away Unicorn!* is planned as a 52 x 11-minute animated preschool series that has been in development for a year. A bible, character designs, images and storylines are complete, with first animations and an initial script on the way. —Jeremy Dickson

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Power Rangers Megaforce

As part of the celebration around the 20th anniversary of Power Rangers, its latest live-action series *Power Rangers Megaforce* made its North American debut in February on Nickelodeon, Nicktoons and YTV in Canada. The show's US premiere was the number-one telecast in its time slot with kids two to 11 and boys two to 11. Quickly picking up sales around the world, Saban has more deals in the works for *Megaforce*.

A fresh start For all its success, keeping a brand relevant for 20 years does not come easily, says Saban Brands president Elie Dekel. "Every time we introduce a new chapter in the Power Rangers legacy, it's exciting and challenging to breathe new life into it," he says. "For *Megaforce* and the soon-to-be launched 21st Power Rangers season *Super Megaforce* (back-end 20 eps of *Megaforce*), it's a brand new cast, story and production."

Broader reach According to Dekel, one of the unspoken goals when Saban re-acquired the brand in 2010 was to re-engage Power Rangers in pop culture. "We're now approaching one billion views on YouTube, we're a global partner with Netflix for 800 episodes, and we have conversations with a multi-generational fan community that spans the world," says Dekel. "Ubiquity is a positive thing in the case of the Power Rangers."

On the linear side, *Megaforce* made its Euro debut in May on France's Gulli and Canal J, and premiered in the UK on Channel Five in August. Brand-new deals have also been signed with Club RTL (Belgium and Luxembourg), MBC (Middle East), Italia 1 and Boing (Italy), Nine Network (Australia), Nickelodeon (India) and ETV (Africa).

Currently in the US, all episodes of *Megaforce* have aired, and the show is now in re-runs. "Broad and continuous exposure is critical to the success of the show. We are at a place now where all of our partners are renewing or want to renew," contends Dekel.

Brand extensions No Power Rangers event is complete without costumed Ranger appearances, a strategy Saban takes very seriously. "Appearances, off-channel promotions and live events are very effective tools for this brand. When the Rangers show up at an event, they create remarkable reactions from fans," says Dekel. In support of Channel Five's UK launch, Saban partnered with Intu Shopping Centres on a back-to-school mall tour featuring meet-and-greets, a fashion show, photo opportunities, a *Megaforce* toy discovery area from partners Bandai and Mega Bloks, and Nintendo 3DS demos of Namco Bandai Games' forthcoming *Megaforce* video game. "Digital is no longer a tail on the strategy. Digital, interactive and social are now the core elements to what a brand like Power Rangers is all about," says Dekel.

—Jeremy Dickson



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Lay of the Land—Italy



Four to sevens in Italy tune into Rai Yoyo

Along with pubcaster Rai's diginet, boys and girls get their cartoon fix from the country's leading DTT channels

When it comes to capturing viewers ages four to seven and four to 14 in one of Europe's most competitive territories for kids channels, dedicated free-to-air digital terrestrial nets are dominating over specialty pay channels.

Eurodata TV research manager Johanna Karsenty explains that DTT penetration in Italian households stands at more than 90%, with satellite significantly lower at just 30%. "Free-to-air channels gathered higher market shares than Disney's or Nickelodeon's channels, mainly because they are available on the free-to-air DTT platform and the others are only available on pay TV," says Karsenty.

The clear leader among girls and boys in the four to seven age group is Rai Yoyo, pubcaster Rai's younger children's DTT channel. Primarily targeting preschoolers, the channel drew a 13.7% market share of boys, and a slightly larger share (16.8%) of girls, in July 2013, according to Eurodata TV Worldwide, Auditel, and Nielsen TV Audience Measurement.

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From January to June 2013, the kidsnet's four to 14 audience consisted of 56% girls and 44% boys, with both genders tuning into its best-performing shows including Italian short-form music video series *I cartoni dello Zecchino d'Oro* and *Shaun the Sheep*, as well as *Peppa Pig* and *Barbapapa*.

Coming in second best among girls and boys ages four to seven for July 2013 was DTT channel Boing. The Turner/Mediaset co-venture posted shares of 11.1% with boys and 7.3% with girls.

From January to June, Boing's audience profile for four to 14s skewed higher for boys (61.6%) than girls (38.4%), with programming including *The Garfield Show*, *Doraemon* and *The Penguins of Madagascar*.

SpongeBob SquarePants and *Tom and Jerry* took honors as Boing's best-performing shows for children four to seven. And its 9 a.m. weekend timeslot was tops with *The Garfield Show*, *Penguins of Madagascar* and *Adventure Time*. On weekdays, the channel's 8 p.m. slot was highest-rated, airing hit shows including *SpongeBob SquarePants*, *Penguins of Madagascar* and *The Amazing World of Gumball*.

Another DTT channel doing well with the boys demo is K2. From January to June, it attracted a much higher percentage of boys four to 14 (71.7%) than girls (28.3%), who latched onto hit shows like *Sidekick*, *The Fairly OddParents* and *Tree Fu Tom*. K2's top-rated shows for the four to seven set are *Phineas and Ferb*, *Pokémon* and *Total Drama Island*.

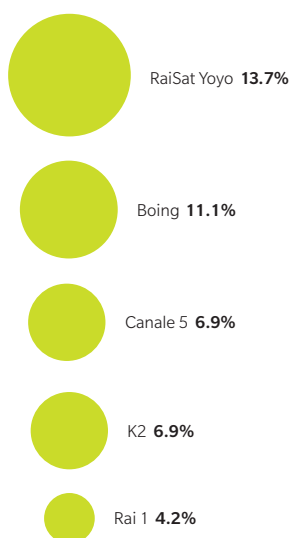
Resonating more with girls four to 14 (75.3%) than boys (24.7%) is the pubcaster's older-skewing Rai Gulp, which broadcasts hit girl-targeted series *Winx Club* and *Mia and Me*. Youth telenovelas *Violetta* and *Grachi* were the best-performing shows for kids ages four to seven from January to June 2013.

Two channels that don't offer kids blocks, but made the top-five list of best-performing channels among kids four to seven anyway are Canale 5 and Rai 1. Popular reality shows like Canale 5's *Italia's Got Talent* and Rai 1's sports programming helped boost the channels' ratings with younger kids.

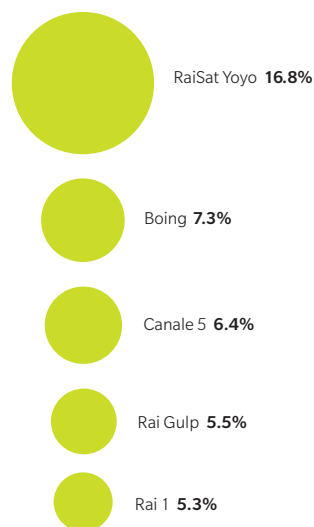
For Italy's generalist channels, Mediaset-owned Italia 1 and Rai 2 are the only ones that air kids blocks, with Italia 1's afternoon block ranked highest. It was also the top-ranked channel for kids four to 14, with *The Simpsons*, *Dragon Ball Z* and *The Cleveland Show* in the top three spots, respectively. —Jeremy Dickson

Top 5 best-performing channels

Boys 4-7



Girls 4-7



Eurodata TV Worldwide is a French company specializing in TV audience ratings research and market intelligence that offers TV data as well as expertise and insight into the performance of TV shows in more than 90 countries. Ratings information is provided directly by research institutes in each country, which, like Eurodata's parent company Médiamétrie, measure daily television audience ratings. For more information, contact sales manager Jacques Balducci (jbalducci@eurodatatv.com, 33-1-4758-9434).

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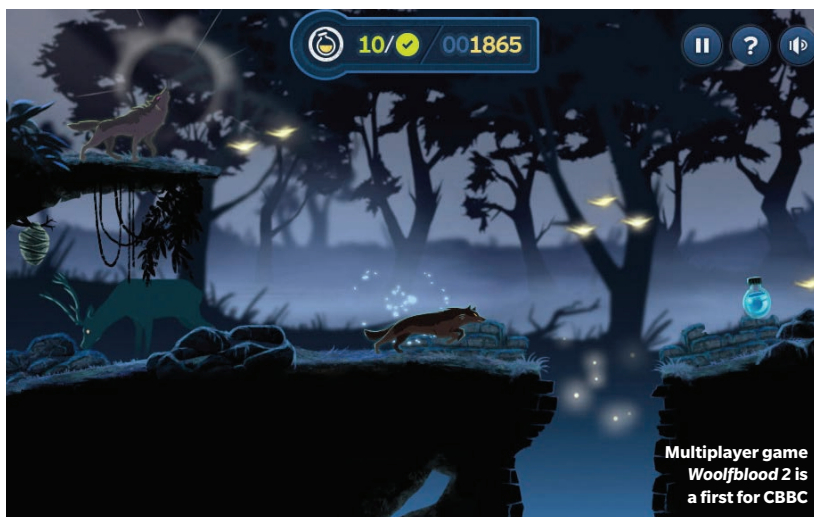
Now Trending—Media

What's bubbling up in kid content culture



What came first—ratings drops or Netflix?

First it was Nickelodeon, now Bernstein senior analyst Todd Juenger is calling out Cartoon Network US for its spring content deal with Netflix, suggesting it's cannibalizing the net's linear TV ratings. According to Bernstein Research, since Cartoon Network made its content available on the streaming platform in the States on March 31, its TV ratings have dropped 10% in homes with Netflix subscriptions, and its total-day ratings for kids two to 11 fell 25% from April to August versus the same period last year. Cartoon Network says it only experienced a 3% decline, and any other decreases were not due to Netflix, but rather the absence of new eps of hit Lego-branded series *Ninjago*, and the fact that much of its new original content debuted at summer's end. One original that's bucking the trend, is new series *Uncle Grandpa*. According to Nielsen, it's pulling in top ratings in its timeslot among kids six to 11.



Online kids games step it up

Online game experiences based on kids TV series are increasingly becoming more inventive and technologically advanced as digital content creators work more collaboratively with TV show writers. Case in point is Glasgow, Scotland-based Chunk's brand-new multiplayer game *Wolfblood 2: Leader of the Pack*, based on the second season of CBBC's hit teen fantasy series *Wolfblood*. The game is a technical first for the Beeb in that it allows players to record their races and stats, which other users can then access to compete in "shadow wolf" challenges without having to connect online at the same time—and no personal data is stored by the channel.

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Its latest property push, Teenage Mutant Ninja Turtles, has delivered at retail for Nickelodeon

consumer products

Ready for retail

Nickelodeon regroups its consumer products division under marketing veteran, focuses on growing new IP

BY GARY RUSAK

After long-time Nickelodeon Consumer Products president Leigh Anne Brodsky departed the company in September 2011, the division's operations on the domestic side were integrated into existing lines of the mother corp's business, including ad sales, marketing and digital groups, and it ceased to operate as a separate vertical line of business. But the promotion of Pamela Kaufman to the role of chief marketing officer and president of consumer products of Viacom-owned Nickelodeon in August signaled a major change for the network's business strategy. Consumer products exploitation is now a priority. In fact, Nickelodeon Group president Cyma Zarghami's expansion of Kaufman's remit indicates a clear desire to forge closer ties between the programming arm of the network and the potentially lucrative realm of licensing.

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Close connection

"It made a lot of sense to keep CP close to all our efforts for the brand and the consumer," says Kaufman. "We didn't want that division to be off on its own, unconnected to TV content. We want to make sure that all the messaging is consistent."

In her new role, Kaufman inherits a position that on one hand has plenty of globally recognized IP within reach, namely *SpongeBob SquarePants* and *Dora the Explorer*. On the other, however, she also has to contend with some well-publicized struggles from previous quarters, including softer ratings, under-exploited secondary properties and a challenging retail environment.



Peter Rabbit is Nick CP's new entrée into the infant product market

Her understanding of the current retail climate is what made Kaufman a fitting choice for the job. She says that "super-serving" retail is a tentpole of her strategy to reinvigorate Nick IP in the consumer products arena. "All the retailers are looking for retail-tainment programs that will differentiate them by product and promotion," she says. And new Nick CP programs moving forward will be a mix between exclusives and marketing maneuvers tailored to specific retailers' demographics and scope.

Kaufman points to the "Dora Rocks" promotion, in which Nickelodeon partnered with US mass-market giant Target at the beginning of this year, as an example of the kind of thing she would like to see more of in the future. The promotion included an exclusive apparel, toy and specialty goods line inspired by *Dora Rocks*, a music-themed half-hour primetime special. The exclusive ran from January through April and also included a CD of upbeat tunes culled from the special.

"It was a successful promotion," Kaufman says. "It featured a toy that was specifically designed by our partner Fisher-Price and it worked well for that particular audience. It was about building the right custom program."

The apparel category is also in Kaufman's cross-hairs as an area that needs renewed focus. "We need to make sure to have on-trend creative," she says. In a kids space that has seen acceleration in terms of merchandising product, and caters to a style-hungry consumer base that is evermore aware of the latest cool thing, she says coordination of

design elements and retail execution has flagged behind the current trends.

"It's really important for us to work with our designers," she says. "We have to, of course, keep our properties intact, but we should be able to apply the looks that are popular to our apparel. That is something we have lost some focus on."

Another area of concentration for Kaufman will be to expand Nickelodeon's packaged goods imprint. "It has the potential to be a really huge growth area," she says, adding that the most likely candidates for growth in this category are latest hit *Teenage Mutant Ninja Turtles* and evergreens *SpongeBob SquarePants* and *Dora*. Expect to see more products like *Dora Snack'n Go* hummus from Canadian food company Summer Fresh.

In terms of new properties on-deck, Kaufman plans to introduce retailers to the anticipated *Dora the Explorer* spin-off *Dora and Friends* that will hit US airwaves this fall. A US master toy deal is in the works and a full licensing program is expected for a 2015 launch.

And then there's Nick's entrée into the infant goods space through a partnership that is reimagining the classic Peter Rabbit IP. The new *Peter Rabbit* CGI-animated series from Silvergate Media, Nickelodeon and Penguin UK bowed on the network last December. Earlier this summer, Vivid Imaginations was named the master toy partner for the UK, Europe and Australia. It will produce a range of branded toys, including figurines, playsets and plush products for a spring/summer 2014 soft launch, with the full range will rolling out in fall/winter 2014. In the US, new Culver City, California-based toyco Cartwheel Kids has nabbed master toy rights. "When you have something that has been around for 110 years, you have to say that it's a good start for us in the infant aisle," Kaufman contends.

Globally speaking

On the global side of things, Kaufman's old colleague Ron Johnson was named head of international consumer products in April and has since been spending his time re-evaluating the business. "My philosophy from a CP standpoint is that we have to do a good job of appeasing and satisfying retailers," says Johnson, echoing Kaufman's sentiments. "Retail strategy, for us, is what is going to drive success."

Johnson says that the biggest challenge for anyone in his position is the coordination of a large portfolio of IPs that have varying degrees of exposure across dozens of territories. "Everything outside of the US is fragmented," he says. "You have a lot of licensees, and in some cases, you have third-party agents. Without question, I want to invest in a more direct organization."

Johnson adds that he is going through the process of deciding where the company could handle its own licensing and where it makes sense to have agents on the ground. "We are going to keep agents in areas where the critical mass isn't there, and in markets where they bring us value," he says. "But long term, more direct organization, more hands on the business, day in and day out, and less dependency on third parties is our goal." ➤ CONTINUED ON PAGE 64

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ITV Studio grows third-party arm

Expanding into third-party rights representation was a natural move for ITV Studios Global Entertainment, headquartered in London.

"It simply makes sense that we look at other rights that might enable us to develop properties beyond television," says Jean Philippe Randisi, EVP of consumer products for ITV Studios Global. "We are now in the position that we have the resources to work on different properties."

After announcing its move into third-party work 18 months ago, the company has since slowly built a portfolio that includes Nelvana's Babar and Matt Hatter from Platinum Films in the UK. To shore up the growing department, industry veteran Melanie Humberstone-Garley took on a new role as head of sales, merchandising and licensing in January.

With roots in a successful international TV distribution and consumer products business, ITV has recently been looking to expand its portfolio beyond traditional TV and has acquired the agency rights for the app *Cut the Rope* across Western and Central Europe and the Middle East.

The broad program includes a master toy license with UK-based Vivid Imaginations, as well as seven sub-agents across the territories that manage more

than 50 different licensees in categories like apparel, accessories, collectibles and stationery.

"The scope of the opportunity is pretty wide," says Randisi. "*Angry Birds* and *Moshi Monsters* really opened that door, but as with TV, some digital content will work and some won't as a licensing program."

Randisi says while there is a lot of hype about digital IP at retail, the factor that will divide the successes from the failures is the level of engagement that consumers have with a property. In this area, he says, *Cut the Rope* has a clear advantage.

"If you have hundreds of millions of people playing a game again and again, that should tell you something about the potential loyalty," he says.

While *Cut the Rope* merchandise will hit the UK's mass market this fall, Randisi says he is always on the lookout to expand the company's portfolio with careful and prudent choices.

"Above a certain number of properties, it doesn't work," he says. "You can keep adding staff, but ultimately you can't stretch the retail space."

While hinting that the company will announce two new acquisitions in the kids space at Brand Licensing this month, Randisi says the guiding principle for the third-party arm will be quality, not quantity.

"The kind of job we will do for properties we represent will be the same as for the ones we own," he says. —Gary Rusak



Nelvana's Babar is now part of ITV's third-party portfolio

➤ CONTINUED FROM PAGE 62

Along with streamlining licensing and administration operations, Johnson is also tasked with finding soft spots in the current licensing environment. It's a role he clearly relishes. "I don't think I would have taken this job if there weren't areas to improve," he says.

As just one example, Johnson notes that while *Dora the Explorer* is a ratings success on TF1 in France, its CP program is not keeping pace. "It has been under-served in that market," he says. "It's a number-one show, but we only have toys on Toys 'R' Us shelves right now."

As can be expected with a portfolio as diverse as

Nick's, there are plenty of territory-specific opportunities, including ones for Teenage Mutant Ninja Turtles in Asia and housewears for SpongeBob SquarePants in Eastern Europe.

"With *Dora* on Russian TV in the fall, we will look to expand our preschool there, not to mention pursue more promotional opportunities with SpongeBob throughout Asia," Johnson adds. "In some of the Asian markets, to be honest, we took our eye off the ball with SpongeBob."

Johnson says along with his team—which includes Laura Silverman Meyers, SVP of strategic planning and operations, and Laura Serocha, VP of international licensing—he will endeavor to take a "market by market" approach that's not necessarily dictated by traditional media exposure.

"Once you create a little critical mass with digital, you can't be scared to go out there with consumer products and support a brand," he says. "I'm a big fan of investing in IP that has history."

Echoing Kaufman's renewed concentration on design and creative, Johnson believes legacy brands like Ren & Stimpy and Doug can also have success at retail with the proper creative behind them. "Even if you don't have the IP in the market at the time, if you have the awareness, coupled with good, cool, innovative product, then you have something," he says. "It really is all about the product." **K**



As *Dora* lands on Russian TV this fall, Nick CP will be on the hunt for licensees in the territory



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It's princess time!

Cartoon Network Enterprises branches out into the girls aisle with a new program based on *Adventure Time's* many female royals

The widespread appeal of *Adventure Time's* deep universe has spurred Cartoon Network Enterprises to extend the series' already robust licensing program into a fully dedicated girl-focused line. "We have seen the expected strong male audience for *Adventure Time* product, but when we went into mall-based retailers, we realized that our core characters really appealed to girls, too," says Peter Yoder, CNE's VP of North American consumer products. "There are actually a lot of strong girl characters, so we thought about how we could better reach that audience in a unique fashion."

The answer came through the development of a new fully rounded line extension dubbed *Adventure Time Princesses*. "It's much different from the princesses you currently see out there," assures Yoder. "It has the Cartoon Network voice—the look, feel and humor that you would expect from us."

Interestingly, the idea had its roots in a successful episode from 2011, where main characters Finn and Jake flipped genders and became Fionna and Cake. "That episode was so popular that we ended up building a sub-segment of our CP program around it," says Yoder. "We saw that it resonated from a social media and ratings standpoint, and it really encouraged the network to get behind it."

The dedicated CP extension included toys from licensee Jazwares, books from Penguin and a six-issue comic based on Fionna and Cake stories from licensee Boom Comics. The launch was timed to coincide with a follow-up gender-swap episode, "Bad Little Boy," which aired

on the network last February. In terms of extending the *Adventure Time* line and coordinating it with content releases, Fionna and Cake laid the blueprint for *Adventure Time Princesses*.

Adventure Time Princesses, however, is much more than an ancillary part of a bigger *Adventure Time* program—it is a fully formed and detailed line in its own right. "The style guides are complete now, and we are in the process of signing up partners," says Yoder. "The big thing we are looking for is a girls apparel partner, which we will be signing in the next couple weeks."

The product launch will likely land at US retail for back-to-school 2014 and include apparel, accessories, jewellery and health & beauty products. And in terms of distribution, you can expect the mall-based retailers like Hot Topic that currently have a relationship with *Adventure Time* to get on-board. But Yoder also sees the line occupying space in the girls aisles of the big-box retailers—a new area for CNE product.

"This will give us a chance to build a bigger statement at retail," he says. "It's our chance to get into the girls departments at Walmart and Target."

The organic development of *Adventure Time Princesses* illustrates a core tenet that has served the IP well at retail—keeping the dialogue between fans and the brand open and constant. "We are listening to our audience," says Yoder. "I think the fact that we are engaging them in a two-way dialogue—where they can see the results of what they like on-air landing at retail—really gives the audience a feeling of partial ownership of the brand." —Gary Rusak



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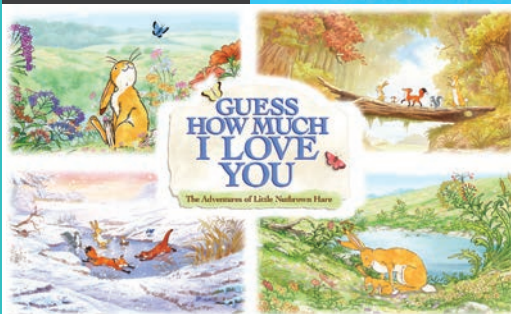
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Produced by August Media Holdings
and Kool Production AS
Distributed by NRK, DR TV, MTV3,
August Rights, Cake Entertainment
Genre Preschool Animation
Format 26 episodes x 7 minutes
Language English
Tel (65) 6592 0577
Email moy@augustmh.com



TRITANS (1 and 2)

Produced by
Monstrou Studio
Distributed by
Monstrou Studio
Genre
Sci-Fi Kids CGI Animation
Format
13 episodes x
23 minutes, SD
Language
English/Malay
Tel
(65) 6324 9108
Email
helan@monstrou.com



HI-5

Produced by Neal Kingston
Distributed by Hi-5 Operations
Genre Children's Edutainment
Format 25 episodes x 30 minutes
Language English
Tel (65) 6602 6673
Email nkingston@hi-5world.com

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Disney Junior grows again

While the 24/7 US preschool channel takes the ratings lead, related products are also on track to conquer mass retail

The runaway success of 24-hour preschool dedicated channel Disney Junior has seamlessly translated into ringing cash registers at US retail. Disney Consumer Products, the biggest entertainment licensor in the world, is expecting the Disney Junior brand to rack up retail sales upwards of US\$1.5 billion this year. Meanwhile, at Disney's top retail accounts in the US, Disney Junior products now regularly command displays in excess of 100 feet per outlet.

"We have been growing," says JD Edwards, SVP of media networks licensing at Disney Consumer Products. "It's a result of the great storytelling and amazing original content."

This fall, Disney Consumer Products will continue to mine the Disney Junior brand with a robust launch for Sofia the First. Rooted in a master toy deal with Mattel, Edwards expects to see Sofia follow the brand's on-air trajectory in the toy aisle. He points to the fact that the premiere of the TV series ranked as the number-one preschool cable launch in US TV history. It followed last November's premiere film event *Sofia The First: Once Upon A Princess* that netted an estimated 5.2 million pairs of eyeballs, making it the top US cable telecast of 2012 for the kids two to five demo, and girls ages two to five.

With toys launching only a year after the series rollout, it is clear that Disney is anxious to reap the benefits of its newest princess's popularity. "It is our quickest launch to date," says Edwards. "The way that content gets out now is quicker, and we are seeing demand [for consumer products] quicker, too."

Edwards says because of that demand, the Sofia program will be broad from the outset, including toys, plush and softlines with a focus on role-play.

Two key items in the rollout are the Sofia 10-inch Wedding Day doll from Mattel that will retail for US\$24.99, and from Jakks Pacific, the Sofia the First Royal Prep Talking School Desk (SRP US\$69.99). The desk stands more than three feet tall and features interactive activities that can be triggered with a push of the button. Edwards says the launch will also be marked by specific items and promotions tailored to each mass-market retailer. "We have developed programs for Walmart, Target, Toys 'R' Us and Costco," he says. "On the toy front, there will be exclusive items and promotions that will hit in October."

Otherwise, this fall, Disney Junior will be extending its other CP lines, adding categories for Jake and the Neverland Pirates, Doc McStuffins and its two Mickey Mouse Clubhouse programs. While each line is driven by role-play toy items, Edwards says that their consumable imprints are growing, and adding grocery and drug stores as distribution points has been a key strategy as the properties mature. Expect to see more deals like Jake and the Neverland Pirate Booty, says Edwards, citing the branded version of the popular puffed-rice/corn snack food produced by Robert's American Gourmet Food.

"There is absolutely room for expansion," he says. "On series like *Doc* and *Sofia*, you will see us get more into consumables as the properties mature."

—Gary Rusak

Format : HD Full 3D Animation
Runtime : 7'20" x 78ep
Target : 3~6yrs
Genre : Fantasy adventure

The Airport Diary 2

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Oh the places he'll go

San Francisco's Global Pursuit lands exclusive rights to rep Dr. Seuss properties in China

It was only a matter of time until Thing One and Thing Two made their way to China. And in an effort to serve the ever-growing appetite in Asia for US-bred properties, San Francisco-based L&M agency Global Pursuit (a joint-venture of Gama-nia Digital Entertainment and Brand Reality) has sewn up the exclusive licensing agent rights for the Dr. Seuss brand in the region.

"It is just one of the brands that we grew up loving," says Cynthia Money, president of Global Pursuit. "We believe there is enormous potential to capitalize and expand upon the current awareness of Dr. Seuss across Asia. It's an iconic brand."

Global Pursuit's connections in the territory, with offices in Taipei, Hong Kong, Shanghai and Beijing, will give Dr. Seuss Enterprises the "eyes on the ground" required to properly shepherd the ancillary extension of its Asian publishing program that was established in 2006.

Currently, 16 Dr. Seuss titles have been released in the Chinese market by China Translation and Publishing, and another 17 bilingual books (Mandarin/English)

have joined them through a deal with Chinese publisher Beijing Oak Tree Books.

"There is already a great connection there," says Money. "They use the books to teach English, so some of the kids market is already familiar with the characters."

Since the ink is still fresh on the contract, the partners are in the process of plotting their strategy. Money says the initial push into the territory will concentrate on landing licensees for apparel, accessories, toys, plush and greeting cards.

In terms of distribution, she says the team will take a "focused approach" to a complex retail landscape. "We are going to look for a couple of retail partners," she says. "For the right partners, we will look at exclusive launches."

The program is concentrating on China, but will also be extended to South Korea and Southeast Asian countries like India, Thailand and Indonesia. While the Seuss portfolio includes numerous established characters, Money says the program is likely to focus on the familiar fun-loving and mischievous Cat in the Hat at the outset. "It's just the most recognizable and classic," she concedes. —Gary Rusak



Global Pursuit will focus on taking The Cat in the Hat into China

Hear, here...

Me Books mines audio customization tech for a new take on the eBook



The Me Books app features a whole new type of eBook

Sometimes the key to harnessing new technology is understanding exactly how not to use it. That's the philosophy behind up-and-coming indie digital book platform, Me Books. "Its strength is its restraint," says James Huggins, co-founder and MD of the children's publishing company Made in Me, London-based parentco of Me Books. "We were interested in the idea that you could create something that made use of new technology, but still left the visual experience untouched."

Me Books takes traditional illustrated children's books and transposes them to the digital environment—leaving the original artwork and narrative intact, but adding a layer of audio that can be altered and customized. The audio layer initially features a voice reading the text. "However, a huge amount of interactivity and fun can be had," says Huggins. "We can create customized interactive play and a sense of fun with an audio layer that is totally transparent and lies over top of the book."

For example, if there are birds pictured in a tree, a child can record their own bird sounds—or even have the birds talk to each other. When a child goes back to the book, he or she can hear what was recorded again, add to it, or delete it. And all the while, the original look and feel of the book is uncompromised.

Aimed at the two to six demo, the Me Books app is currently available for free for iPads and iPods. Corresponding eBooks, of which there are roughly 140 currently available, range in price from US\$1.99 to US\$2.99. Me Books adds a couple of titles each week, and has deals with major publishers such as Penguin, Scholastic and HarperCollins.

Since launching in October 2012, the app has been downloaded 750,000 times. The next step is to bring it to the Android platform and expand its publishing and promotional partnerships in time for the holiday season. Huggins adds that he is always on the lookout for new titles and content opportunities.

—Gary Rusak

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Juicing for success

Y Water innovates the licensed beverage category

Who L.A.-based children's beverage company Y Water was founded in 2010 with the tagline "A new concept in children's beverages." It has since endeavored to offer a healthy alternative in a sector dominated by sugar-laden drinks. "Our mission is to contribute to the beverage world with healthy natural beverages and an emphasis on low calories," says Thomas Arndt, founder of Y Water. "We don't want to threaten people by bringing up the obesity problem, but we want to say that there is a possibility to provide good-tasting product that's low in calories."

What In 2012, Y Water signed its first licensing deal with DHX Media's Yo Gabba Gabba! and created the Kids 50 brand, named to bring attention to the fact that its juice boxes would have 50% less sugar and calories than leading kids drink boxes sold in the US. "We tried to tie in the character with a flavor," says Arndt. "It's perceived as a really smart, intelligent and healthy brand for kids and parents."

Kids 50 comes in four flavors that mix fruit and vegetable juices and are branded with a specific character from Yo Gabba Gabba!—there's Brobee's Goofy Apple, Muno's Fruit Punch, Foofa's Pink Lemonade and Break It Down Berry. Each 6.75-ounce juice box blends apples, carrots and acerola berries with water and contains only 40 calories and 10 grams of sugar per serving. "With kids, getting fruit is not the problem," says Arndt. "But with veggies,

they don't eat as many as they should. So, all of our juices also have vegetable juice."

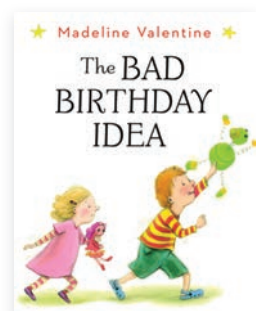
Latest Innovation The key, says Arndt, to the good taste with less calories is the natural plant-based sweetener stevia. "We are the first kids beverage to use it," he says. "It's 200 times sweeter than sugar, but it has no calories."

The sweetener, approved by the US FDA, costs a bit more to use than the industry standard high-fructose corn syrup, but it's an expense many health-conscious consumers are willing to bear. "Our six-pack might sell for US\$3.49 or US\$2.99 on special," says Arndt. "You can find other juice boxes for US\$1.99 for 10, but you have to ask yourself 'What is in there?'"

What's Next The next order of business for Kids 50 is to shore up distribution. Currently, the boxes are available at Shop Rite and Albertson's grocery chain in the East Coast and Walgreens in California. They're also available across the US through Amazon, and Arndt wants to start selling the product at Yo Gabba Gabba! live events held throughout North America. While he says that the company is focused on its Yo Gabba Gabba! line for the time being, he isn't ruling out further licensee agreements in the future.

Contact Thomas Arndt, founder of Y Water (310-804-9625, tarndt@ywater.us)

—Gary Rusak



BookBet The Bad Birthday Idea

The relatable foibles of a sibling relationship is the basis for Madeline Valentine's new illustrated hardcover picture book *The Bad Birthday Idea*, published by Knopf Books for Young Readers. Recommended for readers three to seven, the book tells the story of Ben and his sister Alice. Ben, a lover of all things robotic, finds out that Alice received a robot for her birthday. He just can't help himself and surreptitiously unwraps the gift before Alice can. What could go wrong? Coming in at 40 pages, the title will retail for US\$17.99 and hit US stores on November 12. —Gary Rusak



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Tech time

How much is too much when it comes to kids and the use of electronic devices?

BY TERENCE BURKE

It's an old story, retold every generation. New entertainment technology enters the home, and parents are ambivalent about its presence. They recognize that their kids enjoy using each new tech device that crosses their threshold, yet they lament the “loss of childhood” that results from frequent use of those devices. The crux of this dilemma is time—as in how much time should kids spend using tech? This tech/time management issue is a major concern in many US households. After all, parents want their kids to be happy, and their devices deliver happiness in spades. However, they are also trying to be good parents—the type that limit their child’s tech time. Understanding this tech/time dance, then, opens up a lot of insight into the workings of the modern US household.

The pas de deux

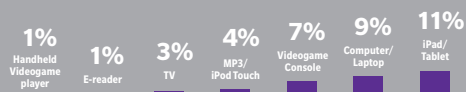
Kids follow their parents’ lead when it comes to tech use. But the dance isn’t always harmonious. In early results from a large field study being conducted by KidSay and The Marketing Store Worldwide, as part of an upcoming white paper on kids and technology, almost half of kids eight to 15 (46%) report that they have argued or disagreed with their parents over technology use. The crux of the disagreements are numerous. A full 70% who reported arguing, said they disagreed about the amount of time spent on electronic devices, while 51% fought over how electronic devices “get in the way of other things in [their] life.” Meanwhile, 34% have disagreements with parents about the cost of devices, and 32% argue about activities performed on those devices. Some kids (7%) report living in very tech-contentious households, and said

they argued about every one of these topics with their parents. As the numbers attest, electronic devices and their usage instigate a number of family conflicts.

As for what kids and parents “disagree about the most,” 36% of kids who argue with their parents about electronic devices report that the number-one topic of dispute is the amount of time they’re using them. As one eight-year-old girl told KidSay, “Dad takes my iPod [Touch] away sometimes because he says I’m on it too much.” This issue of time is even more contentious than the numbers indicate. Qualitative research in support of the study shows that a good

If you could have only ONE electronic device, which one would you choose?

66% Smart Phone



chunk of the 20% of kids who told us they most frequently argue with parents about the impact tech use has on other aspects of their lives are, in many respects, talking about time. As a mom of a 14-year-old boy told us, “I don’t have a problem with his video games per se, but the time he spends playing them means he’s missing out on so much.”

When asked for an example of a recent disagreement that arose regarding this issue, she recalled, “We drive to see his grandmother. Besides him missing out on the scenery—which, I get, is something he doesn’t think is important—he’s not a part of our trip, our conversation, because he’s plugged into his PSP. That’s not OK with me...” Her son’s response? “Mom is always telling me that I’m wasting my life playing video games,” he said. “She wants me outside or doing other stuff. I like playing my games and I’m usually playing them with friends. That’s what she doesn’t get. For her, being social means being with someone in the room. Me and my friends don’t have to do that. We’re being social all the time, just not like she thinks it should be.”

Parental perception—kids’ POVs

This back-and-forth is common. KidSay’s Trend Tracker reveals that 42% of kids eight to 15 say their parents feel they use electronic devices too much (27% “a little too much,” 15% “way too much”). This sentiment varies depending—as most things in the kids’ market do—on the age and gender of the respondent. With tweens, 37% report that their parents think they’re spending too much time on devices, while 46% of teens say the same. Interestingly, the same percentage of tweens and teens feel their parents think they spend “way too much time” on devices (15%).

When considering gender, boys and girls ages eight to 15 equally perceived that their parents thought they spent “a little too much” time using tech (26%). Small gender differences in perception are found in the “way too much” response (13% of boys, 17% of girls). Looking holistically at age and gender differences, it’s no surprise teen girls (19%) are the sub-group most likely to report that their parents think they’re using electronics too much. Data suggests the perception of teen girls is rooted in reality. Girls, whose electronic device of choice is the smartphone, are more likely to be using it in places where their parents are present. In contrast, boys (especially tweens) are more likely to spend the majority of their electronic device time using a video game console, which are found mostly in bedrooms, dens and basements, and are less likely to be in their parents’ proverbial faces during use. It’s a classic case of out of sight, out of mind.

Parental concern over the amount of time kids use tech arises way before kids hit their tweens. KidSay’s Mom’s Tracker (moms of kids ages five to seven) shows approximately two-thirds of moms report having household rules regarding the use of electronics. Having a time limit is the rule moms rank as the “most important” for every device tracked (TV—44%, computer—34%, video games—40%). When we expand that notion of time to include time-based restrictions—such as “weekends only,” “after homework,” “before bedtime” etc.—we learn that almost half of the households with rules for tech list time usage as the top concern.

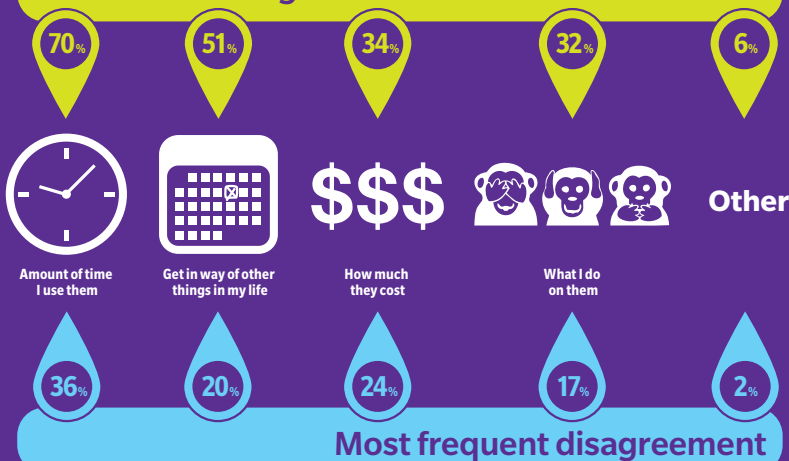
Keeping families in step

With regards to tech-time, keeping kids happy is easy. They’re not the ones seeking time limits. It’s parents that wish to impose time limits and then must implement and

Do you and your parents ever argue or disagree about your use of technology (like computers, phones)?

YES **46%**

Reasons for disagreement (Check all)



Data represents kids ages 8-15

enforce them. Thus, efforts to help families find this balance must be centered on helping parents.

A good example of a product that has a time-control strategy in place is Microsoft’s Xbox. It has parental controls that allow parents to set time constraints on use. However, of the dozen parents of Xbox-playing kids that KidSay interviewed, none knew these controls existed. You can’t leverage a parent-friendly aspect of your product unless parents are aware of it. Making them aware gives companies an advantage that could make a difference in a fiercely competitive marketplace.

Even if your device, game or product does not have built-in controls, you should provide parents with external resources (suggestions, contracts, time charts, etc.) they can use with their kids. Research on parental/child relationships has demonstrated that concrete, tangible limits established together, and made readily visible, help families avoid confrontation and disagreements. In short, help families solve their tech-time conflicts and they’ll see your brand/company as one that cares about the lives they lead. **k**



Terence Burke is Editor-in-Chief of KidSay’s

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Play time decisions

Nick explores how tech time competes with toy time for moms and kids

BY ERIN MILLER

In last month's Kaleidoscope, we took a look at the types of traditional toys kids play with and how often they play with the ones they love best. Having a deeper understanding of the role toys have in homes, part two of this report explores the elephant in the room—technology. We know that the access and ownership of tech devices among the younger set is increasing, but is tech time competing with toy time? We looked to moms and kids to give us their perspective on the topic.

Not surprisingly, almost the entire sample of kids ages seven to 12 admitted to playing with some type of device in the home, whether it's a gaming console, iDevice or tablet. Interestingly, when asked what they play with more, 40% of all kids report they play with toys and devices an "equal amount of time." Even more interesting, this was consistent across all ages. The notion was supported clearly when talking to kids during play dates with their friends. Playtime with traditional toys feels very different from tech time. Even though kids enjoy playing on their devices, it sometimes feels like a novelty as rules around how much time kids can spend

on devices are often set by parents. With toys, kids can fully control their play experience, deciding what they want to play with and when. What are the rules around playing with toys? Those simply don't seem to exist in most homes.

When asking moms with kids ages two to 12 about tech time in the home, the majority agree that, overall, their kids are spending more time on all devices than they were a year ago. Similarly to what kids reported, 37% of all moms said that playing on devices hasn't affected their kids' play time with traditional toys. Moms of preschoolers are most likely to stand by this notion, as we know how important play is at the earliest stages of development. In contrast, moms with older kids ages 10 to 12—especially boys—were more likely to say that their child is spending a lot less time playing with traditional toys. Older kids may be gravitating towards tech as their amusement of choice, however, many moms were still confident that kids would choose their favorite toy over a device the majority of the time. For the moms who said their child would choose a device over toys, their assertions were commonly supported by the fact that a device would be more appealing, because kids don't have full access to devices, which are still a treat in the home.

There is no denying the changing dynamic that's occurring in homes when it comes to technology and devices. While the industry continues to understand these changes, moms are coming to terms with what's happening within their families. The benefits of traditional toys and non-tech play remains invaluable to moms. But the presence of devices is becoming harder for moms to avoid, recognizing that devices have their own set of benefits for their kids. And though 60% of moms said they'd rather see their kids play with traditional toys over devices, the remaining 40% don't have a preference as to what their child chooses. Rather than fight it, moms were vocal about the need to embrace the presence of devices in their kids' lives. This evolving mindset in parenting is something we'll continue to keep a close eye on. **K**

This concludes part two of our study on kids and toys. We'll be back in 2014 with all new topics and findings in the kid and family space.

For more information, contact Kaleidoscope@nick.com

(Source: Nickelodeon Group Consumer Insights Research; Touchstone Research. Quantitative sample size: N = 1,100 moms with kids ages two to 12; N = 600 kids ages seven to 12. Qualitative sample size: N = 40 kids ages seven to 12; N = 60 moms with kids ages two to 12)

A major focus of the Brand and Consumer Insights Department at Nickelodeon Kids & Family is to live and breathe the kid culture. We continually track and identify trends, and explore what it means to be a kid and teen today. In an effort to keep you in touch with our audience and give a voice to our consumer, we've created the Nickelodeon Kaleidoscope. Every month, Kaleidoscope will capture key areas of interest across the kid and family cultural landscape, provide an understanding of attitudes and behaviors, and report on trends and buzz

Apps alongside Abuela

Mobile games enhance Alina's family interaction but lag in language options



Say ¡Hola! to five-year-old Alina from Connecticut, a second-generation American with strong roots in her El Salvadoran culture.

Like many kids Alina's age, she has started building a meaningful relationship with her grandma (Abuela). Alina and Abuela only speak Spanish to one another, even though they are both fluent in English. "I only speak Spanish sometimes...but I speak it with Abuela all the time!"

Because her grandmother spends half the year in El Salvador, weekly Skype chats and spontaneous emails provide a connection that goes far beyond good bandwidth. They use technology to shorten the distance between them, and also connect with it when they're physically together by exploring apps and playing games. An art enthusiast, Alina creates her own masterpieces on the iPad to share with her grandmother over email. In return, her grandmother sends her funny ecards. When they're together, they play games like *Robologic* and *Starfall*.

Alina has discovered some shortcomings in technology when communicating with her grandmother. She has found that her favorite apps don't have a Spanish option for game play or communication, which breaks the strong "solamente en Española" bond she shares with Abuela.

Alina's unmet needs provide opportunity for media and game creators. Kid-friendly translation options for communication apps and popular games will enhance Alina's and other bilingual kids' tech experiences, helping them both learn and connect, bridging geography and generations. —The team at Insight Kids



Insight Kids is a research and strategic consulting company dedicated to catalyzing our clients to build innovative, impactful and inspiring experiences for kids and families. To be further inspired by Alina and Insight Kids, visit www.insightstrategygroup.com/insightkids/.

Cool or Not? The portable digital device edition



Cell phones

Boys 8 to 11 (272)	Girls 8 to 11 (283)	Boys 12 to 15 (282)	Girls 12 to 15 (288)		Boys 8 to 11 (273)	Girls 8 to 11 (272)	Boys 12 to 15 (274)	Girls 12 to 15 (272)
56.6%	66.1%	63.5%	78.1%	Totally way cool *	59.0%	42.3%	48.5%	29.0%
23.2%	14.1%	19.5%	13.9%	Very cool *	21.6%	19.1%	22.6%	16.9%
14.0%	13.4%	13.5%	6.3%	Kinda cool *	13.2%	20.6%	16.8%	28.3%
3.7%	3.9%	2.5%	1.4%	Not cool *	3.7%	10.3%	8.4%	14.0%
2.6%	2.5%	1.1%	0.3%	Totally un-cool *	2.6%	7.7%	3.6%	11.8%
0.7%	0.4%	1.4%	1%	Don't know what it is	3.2%	5.2%	3.5%	4.9%



Handheld video game devices

* Excludes "Don't know what it is" responses



Cool or Not? is part of KidSay's June/July 2013 Trend Tracker. These one-of-a-kind research reports are published 10 times a year and provide a quantitative and qualitative picture of kids' likes, dislikes and trends gathered through in-school surveys with US kids ages five to 15. Contact Bob Reynolds (913-390-8110 or bob@kidsay.com).

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The constant juggle

With the TV and licensing worlds beckoning, apps are just initial touchpoints for modern mobile developers like Outfit7

BY WENDY GOLDMAN GETZLER

For Outfit7, talk is more than just a big game. The Cyprus-based entertainment company's increasingly popular Talking Friends series of apps have now surpassed one billion downloads, and the brand's YouTube views are steadily approaching eight figures, too. Naturally, the company has been parlaying its initial mobile success into online videos, physical toy extensions, and now, a new TV series. In the same vein as competitor and *Angry Birds* creator Rovio, Outfit7 perfectly embodies the rapid and necessary move among mobile content makers to become full-fledged entertainment companies—ones that must also carefully ensure they're not reaching for too much too soon.

It's a complex balancing act for modern game developers, but according to Outfit7 founder and CEO Samu Login, transitioning between mediums has not been entirely difficult. "For the consumer, it's irrelevant if

they're using an app or watching a YouTube video—they don't perceive it that way. For them, it's just one click away for more content," he says. In reaching 700 million YouTube views for the Talking Friends videos, which include webisodes, music videos, user-generated content and trailers, Login says it's been relatively easy to get people to go to YouTube while using their mobile devices, since they're already engaged with apps. "We look at our characters not only from an app perspective, but also from a content one, because we are a global entertainment company," he contends.

Entertainment behemoth Disney may present a model worth emulating, but it's also been a business partner for Outfit7. The companies worked together last year to create webisodes and two music videos—the first single sung by Talking Tom and Talking Angela entitled "You Get Me" generated 130 million views online.

"The videos we created with Disney got views outside of YouTube, as well as inside our apps and on Disney websites, so it was a great experiment to see how audiences would accept other content formats," he says.

Right now, landing traditional TV is a priority for Login, who has an animated series in development in-house with a planned Q4 2014 launch. The 52 x 11-minute CGI comedy is going to make its first appearance at MIP-COM this month. Using the original Talking Tom character that first debuted in July 2010, *Talking Tom on the Road* (working title) doesn't have any signed deals yet, but the company's been busy beefing up its traditional TV team and potential content partnerships. "I want to do all of this while maintaining the theme of self-expression. I would say bringing Talking Friends to TV is only one aspect of how people perceive the characters, and it will offer a new brand perspective."

Scott Steinberg, CEO and analyst at consulting firm TechSavvy Global and author of The Modern Parent's Guide high-tech parenting series, says the heightened scale of competition in the mobile space means that companies must have a viable and vast portfolio in order to stand out from the crowd.

"In a world defined by 24/7 competition, if you're able to build a brand, you are already set apart. And even though there are about a billion apps out there, only 25 developers are generating the bulk of the revenue in the space right

now," Steinberg says. "There's been some tapering off with smartphones and tablets, so companies need to look elsewhere to entertain."

And while stepping into traditional TV may seem like an ambitious move, it's a natural progression that's been tested for 30 years with past migrations of video game franchises like Super Mario Bros. to the small screen. "If you can get distribution, it can be a hugely effective vehicle to reach mainstream audiences. Of course, it can be an expensive risk to take," says Steinberg.

Outfit7 hasn't been totally risk-averse in the licensing realm. The company just brought its consumer product program in-house after ending a two-year global rep deal with New York-based licensing agency Beanstalk. It now uses licensing agents in select territories that report directly to Outfit7's CP team. "We find that it's more effective to have an internal team to manage brand exploitation and set the licensing strategy at a global level. We were inexperienced in that area before," Login admits.

So far, Outfit7 has found the most success in the interactive toy category, which includes its SuperStar range that launched last holiday season and has been outselling regular licensed plush, despite being sold at a higher price point. "This is a clear sign to us that consumers want more interactivity," Login says. "We only did sales through online stores for last year's SuperStar range, and for this holiday season we are better prepared with presence at key retailers." **K**

TechWatch Keeping an eye on the gadget scene

A fast start with Robot Turtles



What it is

If Kickstarter has anything to do with it, one Google programmer may have cracked the code for teaching young kids simple computer skills. Board game *Robot Turtles*, the brainchild of Google Comparison CEO Dan Shapiro, made its debut on Kickstarter in early September and exceeded its US\$25,000 financing goal by more than sevenfold within a week.

How it works

Aimed at kids ages three to eight, *Robot Turtles* is laced with computer programming principles. The board game is designed for children and grown-ups to play together, and the former essentially gets to control the latter. Kids use instruction cards to drive themselves through a maze to capture jewels, and grown-ups act as the computer, executing their commands on the board. Players can "debug" the game and "unlock" new features, which can change the course of play.

What it means

With toy-integrated virtual games dominating the tech space, it's refreshing to see a game that's entirely physical, yet still serves to reinforce tech fundamentals and the increasingly important role of programming literacy. The game undoubtedly has the power to infiltrate the publishing space once it starts shipping this December—and it's easy to assume that it will find its way back to the computer itself in some form. —Wendy Goldman Getzler



New Kid in Town

Dabbling in the talent pool

Finding a voice With throngs of TV talent searches and newly discovered Justin Bieber-esque pop artists infiltrating today's mainstream culture, it may seem easier than ever to become a rising star. In actuality—and not TV reality—helping kids hone their talents isn't always so simple. Enter Tryout.net. The newly launched platform is designed to connect kids and parents to entertainment brands, as well as talent opportunities. The free and subscription-based website serves as a tool for parents and kids to pursue various interests—from finding registered soccer coaches, to following favorite rock bands. But there's also an inherent user-generated content element that lets brands directly interact with interested fans via contests and other social media offerings, in a fully COPPA 2.0-compliant setting. Based in Israel and California, the three-month-old company of the same name has so far raised US\$750,000 in funding and attracted more than 15,000 users within a month of going live.

Star track “We’re giving kids a way to get their social media fix that’s allowable,” says Brad Schultz, co-founder of Tryout and the former head of Mind Candy’s TV division. “There’s such a plethora of new talent out there—look at how YouTube’s been used as a way to discover talent. But this gives kids a chance to start at a younger age and get more personal with professionals and brands. Also, platforms like Facebook and Twitter are not COPPA-compliant.” To be sure, Tryout is not a true social network since users can’t see other members’ profiles, but it is akin to Facebook in the way enables users to follow brands they like. For instance, Nickelodeon brand Big Time Rush hosted Tryout’s first contest, which drove 3,000 kids to enter right off the bat. Participants (primarily six to nines) learned about the contest via Big Time Rush’s social media efforts, and 32% of them ended up watching videos on the band’s Tryout-hosted channel.

“The idea of making a kid a star is changing,” says Tryout co-founder, Ben Laski. “The goal is not to be a superstar, but every kid has a talent in something, so here’s a way to explore that and find opportunities to go after.” Tryout offers a premium model for parents that includes a one-time US\$1 verification fee—part of which is donated to charity—allowing kids to explore the site and follow selected brand channels. For premium content and access to things like casting calls and modeling gigs, the site charges US\$9 per month per child for unlimited submissions. “We want to make sure the parents and kids don’t just apply for everything,” says Schultz. The company has employees dedicated to manually verifying businesses and independent instructors. “Every one of these brands, bands, sports outlets, etc., has a channel on the site and is vetted beforehand,” says Laski.

Next moves Of course, just like in the entertainment world, it’s who you know. And Tryout is in the midst of building its membership base and network of partners. The goal is to build a large online rolodex of casting directors, talent agents and brands in the kids media business. “A lot of these companies have difficulty engaging kids,” says Schultz. Therefore, the contest element is a large driver for Tryout, which also houses a proprietary contest platform that lets brands reach out to parents directly—such as requesting parental approvals for entries. But with 70% of subscribers under the age of 13, the focus remains on the younger cohort. “We’re working across a number of different verticals, all tailored to kids,” says Schultz. “We want content from both celebrities and big media brands, as well as coaches and industry professionals, so that every kid’s interests are fulfilled.” —Wendy Goldman Getzler

The Digits

Numbers that speak volumes about kids and technology

A full **78%** of US parents with tablets and kids under the age of 11 let them play with their devices while at home...
(Nielsen)



Photo: ianahorn

...And more than half of those American tablet-owning parents say their children are using the devices for **educational purposes**
(Nielsen)

In total, the mobile ad market will jump by 89% this year to **US\$16.7 billion**
(eMarketer)

More than half (51%) of teen app users have avoided certain apps because of **privacy concerns**
(Pew Internet)



Photo: Shutterstock



Pumping up the volume

China's entertainment biz is booming. *Kidscreen* takes a temperature read of the country's overall media landscape, as co-productions and joint-ventures—inside and outside the kids business—reach new heights.

BY BRENDAN CHRISTIE

With a population pushing 1.4 billion and a rapidly expanding middle class, simply put, China is the media market of the future. The country currently boasts the world's second-largest economy—although that's predicted to change by 2016, when it shoots past the US. Right now, its people have an historically unprecedented level of disposable income and an insatiable hunger for entertainment, the production of which is playing an increasing role in the Chinese economy.

According to a study released this past spring by the US Motion Picture Association (MPA) and the China Film Distributors and Exhibitors Association (CFDEA), China's film and television industry contributed US\$15.5 billion (100 billion Yuan) to the economy and accounted for 909,000 jobs in 2011, while generating US\$3.4 billion (22 billion

Yuan) in tax revenues. Those contributions are led by an exploding box office that topped US\$2.7 billion in 2012 (notching a 36% growth year-over-year), surpassing Japan and putting China behind only the US as the second-largest film market in the world. It now also stands as the third-largest filmmaking nation in the world, after the US and India.

That growth is being driven by a massive big-screen expansion. In 2012, China had roughly 13,000 screens, up from about 9,300 the year before. But more than 10 new screens are being added everyday now, the vast majority of which are digital and 3D-ready.

Currently, most box-office releases are domestic films, because the Chinese government maintains tight control over the number of foreign films allowed in the country, both for cultural reasons and to protect the domestic industry. And



Sesame Workshop was one of the first kids content companies to pursue co-pros in China, but it isn't alone any more

until 2012, that meant only 20 titles were allowed into the country as revenue-sharing foreign films—films that were allowed to take a percentage of box-office receipts, rather than a one-time distribution fee. (That quota did not apply to films imported solely for use on 3D or IMAX screens.)

Last year, however, 14 additional 3D or IMAX films (along with their 2D versions) were designated as revenue-sharing. That's a significant change, should those additional films actually be allowed to enter the Chinese market. According to 2012 data published by China's State Administration for Radio, Film and Television (SARFT), box office for imported movies rang in at US\$1.4 billion, while domestic revenues totalled US\$1.3 billion—roughly 51% versus 49%—while seven of the top 10 films were Hollywood blockbusters.

With such a limited window of opportunity and such high rewards, feature producers often look to co-productions to gain access to the Chinese market. Being designated a co-production involves applying to the China Film Co-Production Corporation (CFCC) and then obtaining the approval of SARFT. But producers be warned—only a few dozen applications are approved each year.

China has film co-production treaties (no television treaties, unfortunately) with countries including Australia, France, Hong Kong, Singapore and South Korea. (Though Hong Kong dominates the existing number of actual co-pros.) Rumors are circulating that India may be next, which would likely result in a fruitful pairing of two of the world's top three volume producers.

In order to be designated a co-pro—and understanding that any description of government regulations in a few lines represents a gross simplification—films must be a joint production (a true 50/50 partnership), an assisted production (the foreign company provides the money, but the project is produced in China), or a contracted production (the money is foreign, and parts of the film are produced in China).

But there are other ways to access the market. Increasingly companies are choosing to appear more like domestic entities, whether that means Chinese companies acquiring foreign assets or vice versa. In fact, the *Los Angeles Times* notes that Chinese spending on the acquisition of US companies reached US\$11 billion in 2012 (more than triple the previous year), while Americans sent nearly US\$10 billion the other way to acquire Chinese assets. The *Times* says that these were typically “smaller deals of less than US\$250 million,” so it's easy to see the nature of the integration taking place. Examples include News Corp taking a 20% stake in Chinese film distributor Bona Film Group, as well as Walt Disney Studios and DreamWorks Animation launching joint-ventures in China.

It's noted in CMM Intelligence's *China Film Co-Production Report—The Survivor's Guide* that “no regulations exist allowing for Sino-foreign joint-venture production companies. The envisioned JV between DreamWorks and a number of Chinese entities, announced in February 2012, is from a Chinese regulatory point of view, a ‘technology’ partnership.” ➤ CONTINUED ON PAGE 93

Animating the future

What does the future hold for the animation industry in China? Yu Peixia, president of the China Animation Association, offers his expert insight.

Over the past decade, China's animation industry has evolved tremendously. It now boasts 5,000 studios with a combined production volume of 200,000 minutes per year.

CCTV Kids, five satellite channels and 32 terrestrial channels together air a total of 120,000 hours of animation each year. The average consumption of animation is 38 hours per capita, with the core audience being kids four to 14 years old. Last year, 33 animated films were produced—up more than 37.5% compared to 2011.

China's animation industry is undergoing a critical period of transformation, shifting its focus from scale to brand-building. Going forward, a National Animation Brand Building and Protection Plan is being implemented, with the goal of nurturing a host of homegrown animation brands. Animation companies will be able to utilize the investments to formulate longer-term brand development strategies and invest in high-level workshops for content creation that will train hundreds of senior animation professionals. Companies are also encouraged to develop overseas markets.

By 2015, we forecast that there will be at least five to 10 original Chinese animation brands that can boast considerable international recognition. Meanwhile, more importance is being given to spin-offs such as video games, web and mobile animation, and comics. To realize this transformation, we need to prioritize three factors:

1. Investment in good “brand genes”—namely brands with a high likelihood of becoming international, commercial successes. IPs with good brand genes are usually quality works backed by sufficient budget for production and promotion.
2. The necessary brand-building tools, including sophisticated promotional platforms and copyright marketplaces, a robust distribution channel at home and strong bonds with international broadcasters.
3. An elite team of excellent screenwriters, directors, artists, animators, audio technicians and marketing professionals.

Thanks to the continued opening up of China's cultural content market, many renowned animation brands have been introduced to China. They have greatly enriched the market and vitalized the local animation community, and their presence brings both opportunities and challenges to local competitors.

China's animation industry currently lags behind the world's leading powers, but this represents an enormous potential for industry development, market growth and international cooperation. ☺

Coming Soon—Kidscreen East!

Kidscreen and the China Animation Association have partnered to develop a brand-new annual event that will bring kids entertainment executives from the East and the West together for three days of business networking and professional learning. The first Kidscreen East event will take place next July in Qingdao, China, featuring a conference program designed to stimulate better dialogue, collaboration and trade.

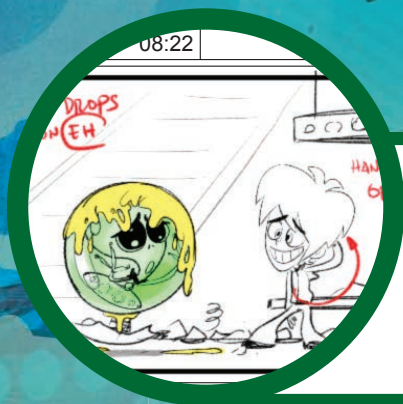
“We feel that Asia—and China, in particular—has the most undiscovered creative and business potential in our industry's global market right now,” says Kidscreen VP & Publisher Jocelyn Christie. “Kidscreen East is all about exploring and cultivating that potential, and we are extremely excited to be paving the way for what is certain to be an important phase of growth for the kids entertainment industry.”

The CAA's members include China's leading children's television broadcasters, producers and distributors, as well as consumer products companies working with animation IPs. “We hope that Kidscreen East will provide China's animation community with the business-to-business platform it needs in order to link with partners from the international market,” says the organization's president, Yu Peixia. “And we believe that it will also become the go-to event for international companies and individuals hoping to understand China better.”

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The view from within

Co-production reality check

Don't look to China as a source of quick cash, expect to invest resources to get the biggest return

Although co-productions are often the default for producers looking to get into a lucrative region, Ciwen Kids VP Sean Chu says it's a little more complicated in China, where there are no treaties to guide the way.

"With no treaty signed and no procedure to follow to get all the required documents from the partners," he points out, "it's a problem for foreign partners to get enough money from their government or through tax breaks."

But when it comes to co-productions, Chu's frustrations often stem more from the approach of prospective foreign partners. "If the project is coming from another country, the program has to follow that country's rules first," he says. "That means it's going to be harder to be classified as a Chinese project."

He asserts that if partners can't fulfill the needs of both markets in a co-pro, then they should look to the Chinese market first and export to the international market from there.

He also points to the discrepancy in budgets as an issue. "A low-budget animation project in the West is a big-budget one in China," he says. "I've talked to producers who are looking for 70% of their budget, and they are targeting China—and the story itself is not China-related. If the story is not Chinese, then you are competing with companies like Disney and Pixar and other [big-budget, international films]. And then your budget is almost nothing compared to them. You're in the middle."

Add to that the fact that Chinese broadcasters only want to kick in 10% or 15% of the budget, and he says it becomes clear why



China's Ciwen Media prefers to handle IPs from distribution through to licensing to get the best results, like its recent deal with Nelvana to rep 1,000 half hours that includes *Franklin*

to make extra money in Korea, or sell in Singapore," he observes. "They come here and they are hoping for the same. They don't spend extra money to make more money. In China, it's different. You have to allocate a budget to develop the market."

That also means being on the ground and developing relationships across all aspects of the industry. "The Chinese market is changing everyday," he says. "Everyday there's

represent more properties—so that we can grow everybody together.

"Sometimes, people will make a trip—they'll say 'I was in China three times last year'—it doesn't work that way. In Canada or the States, that works. In China, it doesn't. You come here and they say 'Hello' and they are very nice to you, you go for beers and drinks and everything is good—and then they forget about you. Some big companies have one person in Shanghai,



"Western companies produce something and look to make extra money in Korea or Singapore. They come here and hope for the same. In China, it's different...you have to develop the market."

— Sean Chu, Ciwen Kids

Ciwen takes a full-service approach to the IPs it licenses or produces, and also looks to consumer products and online markets for potential revenue streams.

China, Chu notes, is not a place to look for money. It's not a market to exploit—it's a market to partner with. And to make money, you have to invest money. "Most Western companies will produce something and look

something new, and there are many players. You have to be here. You have to be on the ground talking to people, because there are too many dots to connect. The market in China is not very organized. It's very hard to make all the connections, so you have to be here talking to people. Here, everybody pays you a little money. You have to start with a little money and grow that. That's why we

and for five years they do nothing. What can you do with one person? Other people will come with four or five people and have many meetings and then nothing happens.

"Either you come here and you have a proper office here, or you work with a Chinese company you trust and you can try to grow together. It's really hard otherwise."

—Brendan Christie

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The view from within

Animation nation

China's toon industry pursues quality over quantity in face of a looming sea-change

All indicators suggest that China will produce an international animation blockbuster in the next five years. And when it does, it could signal the start of a wholesale change in the industry.

That might sound like a bold claim, but the evidence is becoming clear. From about 2004 to 2011, China concentrated on building animation capacity, mostly through service work and production partnerships. At the start of that cycle, the country's animators produced around 4,000 minutes of animation per year. At the end, it was cranking out roughly 260,000 minutes annually.

But then something happened. The country's output dropped for the first time in a decade.

"China's animation industry is experiencing a transition," observe Ye Chow, GM of Toonmax, one of China's more prolific studios. "It's gone from seeking quantity to pursuing quality. It's evolved from chasing output volume to focusing on branding and commercial scale. Producers, broadcasters and government regulators now pay attention to quality, ratings and L&M potential. They do more in-depth analysis and research—and they are being more careful when it comes to production pick-ups."

Says Ye, this shift came about thanks to an industry-wide realization that there just wasn't enough emphasis on development and pre-production, as well as a lack of well-trained writers and production managers. "It's a collective enlightenment," he says, "and a wish to produce quality content that will travel outside of China."



One of Toonmax's first co-pros, Beijing Opera Cats

to communicate with and educate children, which is increasingly a priority.

For its part, Toonmax decided to get proactive about 18 months ago and started to learn from the best in the industry. "It's a very carefully planned strategy," observes Ye. "We want to engage experienced talent from outside of China."

Toonmax has sought experts and held in-house workshops, including bringing over James Lamont and Jon Foster from *The Amazing World of Gumball* to lead a four-day course

That evolution is critical, because Toonmax is not only a producer—it also operates top cable, satellite and digital TV outlets, works as a distributor and has its own L&M and event divisions. The company works with the biggest names in the international industry, including Disney, Nickelodeon, Sesame Workshop, BBC, Mattel, Hasbro, Dreamworks, Toei and Lego, and is positioning itself to become a global force with its own IP.

As for the future, Ye sees a continuing emphasis on getting it right. "The improvement in China's overall animation quality will attract more



"Broadcasters and government regulators now pay attention to quality, ratings and L&M potential. They do more research—and they are being more careful when it comes to pick-ups."

— Ye Chow, Toonmax Media

Toonmax media consultant and industry vet Alex Chien agrees. "The L&M people, the publishing people, as well as the broadcasters, are saying: 'What have we done wrong? Let's look at this.' It's definitely an awakening for Chinese producers to understand that catering to the Chinese market alone is not enough."

While China has traditionally been strong on TV dramas and features, it sees animation as an important cultural asset and a tool

on scripting. For its new MIP-bound 2D series *Stone Bone Rocks*, Toonmax turned to Leanne Preston and Edinburgh's Bright Box Creative for added expert insight.

But the company has also sourced local experts for its new 2D/flash series *NuNu & LuLu*. Toonmax spent some time culling script and design consultants, as well as educational experts, from the prestigious Shanghai Normal School.

viewers," he asserts. "And there will definitely be more successful brands emerging from the country's industry. We're optimistic about the animation industry in China in the not-so-distant future, and we're starting to see amazing talent emerging locally and from returning Chinese trained in the west or Japan. With the right infrastructure in place, we can only anticipate growth and excellent creative from animation in China."

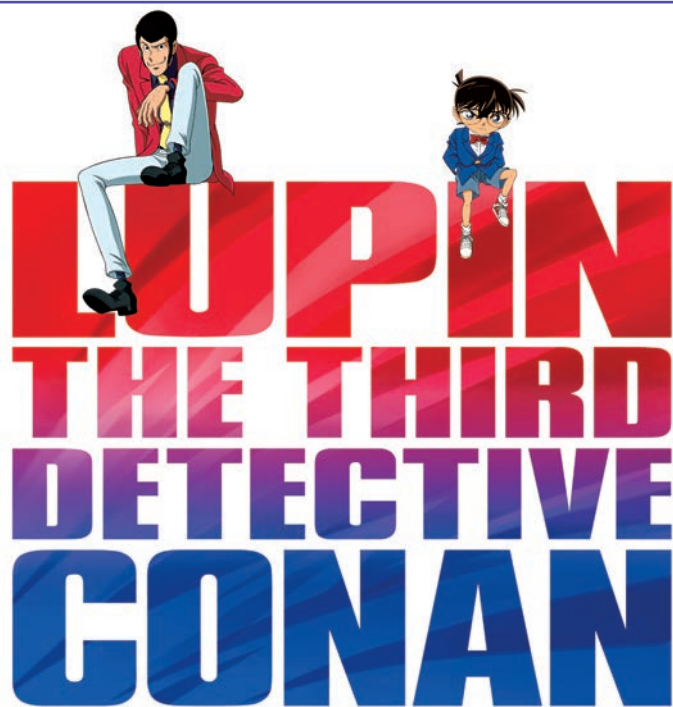
—Brendan Christie



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On the set of preschool series *Hoopla Doopla*, a genuine 50/50 Chinese-Australian kids co-pro

The view from without

Kids TV co-productions on the ground

If you're looking to work with a Chinese partner, it's best to leave your preconceptions at the door

China may have several film treaties to help pave the way for big-screen creative collaborations, but things get a little more complicated when it comes to TV. Each partnership for the small screen is a whole new expedition, and while there may still be some dragons lurking in the unfinished corners of the map, the path has become easier to negotiate with regular use.

Certainly, there's been an upswing in international/Chinese co-productions on the kids TV front in the last 12 months. Hasbro Studios has started working with Toonmax Media (a part of China's Shanghai Media Group) on a preschool series based on its Play-Doh brand. Called *Pei Le Doh*, the 26 x 11-minute preschool series will be filmed completely in China and then dubbed into English for the international market. At Licensing Show this past June, HIT Entertainment SVP Edward Catchpole, spoke briefly of a yet-to-be-revealed co-pro underway with the country, while South Korea's FunnyFlux Entertainment, QianQi Animation in China and Little Airplane in the US had just announced CGI co-pro *Super Wings*, just as we were going to press.

There's also new preschool series *Hoopla Doopla*, produced by Beyond Screen Production, The China Television Drama Production Centre for ABC Children's TV in Australia, and CCTV. This live-action project features a cast and production team sourced equally from both countries.

"Every deal is different," says Ron Saunders, GM of Beyond Screen Production. "The animation we have done [with Chinese partners] tended to be pretty normal, in that we would do above and below the lines, and China would do the animation," he says. "But with live action, the responsibilities tend to be more evenly spread. For instance, with the current project, we have a number of the department heads in China. We have two directors, one Chinese and one Australian, and the actors are from each country equally. It is a small cast, but it is 50/50."

Saunders describes the Chinese domestic market as mature, and says it has become easier for foreigners to work there. That said, he cautions patience. In some ways, the market is still just beginning to build the capabilities required to make things run smoothly in a top-tier region. "A good translator is worth their weight in gold," he notes, as one example. "But there is more and more demand for translation services in China, and that can make life a little more difficult."

When it comes to the much-discussed topic of censorship, Saunders says it's never been an issue (especially for the most recent preschool project). "Working with CCTV in many ways is similar to doing something with PBS," he observes. "They know what they want, and they know what is going to work for their audience."

Producers, therefore, should expect a true creative partnership. "What we found was that they wanted to have—and we certainly wanted them to have—genuine creative input into the scripts," Saunders notes. That included rolling in familiar Chinese cultural landmarks (such as the Festival of the Moon), to counter-balance ones more familiar to a Western audience.

This observation is also reflected in the experiences of Sesame Workshop, which has worked in the market for more than 30 years, beginning in 1983 with a one-off co-pro with CCTV called *Big Bird in China*. This first project led to local adaptations and co-productions such as *I Love Science* (dubbed), *Zhima Jie* (Sesame Street in Mandarin) and *Big Bird Looks at the World*, a new project supported by Toonmax Media, among others.

"I think everyone is just really savvy now," says Maura Regan, SVP and GM of global consumer products at Sesame Workshop. "The media landscape is very competitive, as it is everywhere, and I think that you can't go in assuming that it's going to be any different."

Regan describes her relationships in China as very collaborative, with Sesame bringing its globally recognized format to the table and local partners turning it into a show that reflects the audience. That partnership is especially important, she notes, for programming that has a strong educational mandate, which must conform to the needs of local educators.

As with any other country, she explains, working in China is all about connections. “You need to do due diligence,” she observes. “You need to establish those relationships. I think we’re in a somewhat privileged position in that we do have such a long history in China. But we have invested a lot as an organization, spending a lot of time there and really getting to know the people and their goals, both from an educational and popular media perspective.”

To that end, Sesame has hosted delegations from CCTV and Shanghai Media Group, and it opened a Shanghai office in March. “It’s the first time we’ve had an office on the ground there, even though we have been dabbling in China for all these years,” says Regan. “It really is a huge commitment on the part of the Workshop, but we believe, given the number of children we can reach, that it’s a place we need to be.”

While some are getting in on the ground floor, other companies are using local experts as an entrée into the market. Last year, for example, Canadian animation company Nelvana Enterprises struck a distribution representation deal with Beijing’s Ciwen Media Group for 1,000 half hours of programming, including titles such as *Franklin*, *Babar* and *Rolie Polie Olie*, as well as a merchandise rights agreement for *Franklin*, *Ruby Gloom*, *6teen* and *Grossology*. Beyond being a producer and distributor, Ciwen also has a long track-record for licensing international IP for key market categories throughout China.

“We were looking for a partner in China who shared our goals,” says Jerry Diaz, VP of worldwide sales and distribution at Nelvana. “Ciwen shares our vision to build awareness of key brands through quality broadcast and on-demand placement, age-appropriate and well-crafted licensed merchandise, and brand-based publishing programs.”

Finding a partner who knows the ins and outs of the entire market can be preferable to going it alone, because China is not as homogeneous as some would believe. (Beyond’s Saunders compares it to Europe, with each province operating like a separate country.) But Nelvana has also used partners to target regional broadcasters.

“There are over 200 local TV markets in China,” says Diaz. “It’s very difficult to get the type of blanket coverage you can get with CCTV by going market to market.” In addition, he says, these local markets are used to shopping locally or within Asia for programming, and are more used to bartering for ad time, not paying license fees. That said, China is changing rapidly, and with the help of Well Go Taiwan, Nelvana recently did its first broadcast deal with a local channel—Guangzhou TV for *The Backyardigans*.”

His advice for working with partners in the region? “You need to respect the Chinese culture, first and foremost,” says Diaz. “Both as it relates to content, and as it relates to the way in which they conduct business. The Chinese have strong long-held beliefs in both of these areas, and demonstrating respect for them allows for the best long-term chance of success.”

—Brendan Christie

“The number of internet TV subscribers in the country is expected to top 100 million by 2016. But as it stands now, China’s government has only issued eight internet TV licenses.”

With so much happening in Chinese media right now, government and its related regulators are hard pressed to keep up with the pace of business. So how’s it playing out in the television landscape? Launched in 1958, CCTV dominates the Chinese landscape as the central television provider, with 22 channels reaching well over a billion (yes, billion) viewers. Children are the top priority on CCTV channel 14 (CCTV Kids), which airs between 6 a.m. and midnight, but kids blocks also exist on the main channel and overseas outlet CCTV 4.

On cable, things tend to be a little less straightforward, with approximately 3,000 television stations pumping content to every corner of the country. Will Yan, SVP of worldwide sales at Incognito Software, recently told CircleID.com that “official figures...indicate that China has 400 million TV households, of which 210 million subscribe to cable TV. Of these cable subscribers, 140 million receive digital service while the rest are still on analogue systems.” China has a plan to fully digitize by 2015, but that’s a hefty number of users that still need to be pried away from analogue feeds.

As is true everywhere (and Asia especially), pay-TV audiences continue to grow in China. Data from Digital TV Research shows that the country already leads the world, with 232.8 million pay-TV homes (ahead of India and the US). But as China’s media landscape matures, it’s likely to become far more amalgamated in order to more efficiently deliver content to China’s dispersed population.

Right now, it is estimated that China has more than 560 million internet users, who spend more hours online than they do with TV, print and radio put together. The online TV market, therefore, is playing an ever-increasing role in the media landscape, with cable operators and internet providers fighting for a bigger piece of the pie.

And with good reason. iResearch recently announced that China’s online advertising revenue reached US\$12.3 billion (75.31 billion Yuan), up 46.8% over last year. Display marketing (banner ads etc.) is estimated to be worth about half that—US\$5.2 billion (32 billion Yuan)—putting China third after the US and Japan, but equal to the entire European market. iResearch predicts that the market could top 100 billion Yuan in four years, toppling the US from dominance. In short, that is a lot of money up for grabs.

China Times reports that the number of internet TV subscribers in the country is expected to top 100 million by 2016. But as it stands now, China’s government has only issued eight internet TV licenses, and new players must partner with them to launch. That’s a level of consolidation almost the exact opposite to the cable environment, where thousands of singular stations operate throughout China.

But there’s one more very good reason to pay attention to online TV. According to another study conducted by iResearch, the number of cable viewers appears to be dropping, and the majority are now over 40 years old. So, the future of media on the small screen in China seems to be online. **K**



Multichannel maneuvering

Navigating sales between linear and other proliferating platforms is only getting trickier. The era of non-exclusive digital deals is coming to an end, monetizing branded online channels is a slog—and buyers of all stripes are not in the mood to share.

BY JEREMY DICKSON

Sometimes the kids industry's greatest opportunities simultaneously present its biggest challenges. According to The Jim Henson Company's EVP of global distribution Richard Goldsmith, digital services, whether subscription, ad-supported or transactional, provide significant opportunities for everyone in the kids content business, but the impact of the new digital frontier on TV has made the deal-making process more challenging for producers and distributors. "Linear TV is still the most prolific platform. As a content supplier of expensive productions, we need the revenues and mass exposure from TV in order to do merchandising," says Goldsmith.



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And TV numbers worldwide are on the rise, according to a new report from UK group Digital TV Research. The number of global pay-TV households rose from 585 million in 2008 to 772 million last year, with total revenue jumping 28.5%, driven mainly by new subscriber growth in Asia-Pacific. Meanwhile in the US, a September SNL Kagan report found cable providers lost 607,000 subscribers in Q2, effectively doubling Q1's loss that was driven by cord-cutting in favor of internet TV. Despite the contradicting stats, what it all means in the kids space is that broadcasters are clinging more tightly to exclusive content to drive viewer and subscriber retention (if not growth), while non-linear platforms are now making demands for exclusivity to attract more of those cord-cutters. So the fight for rights is only intensifying.

"For every deal we do for TV, there is now a very long discussion about what digital rights and windows they are going to get," notes Goldsmith. He says some networks simply won't license programming unless they receive certain digital rights—including SVOD—while others are more flexible. On the digital front, he contends that SVOD companies are now asking about what kind of exclusives they will get against TV broadcasters. "It means they want your content, they'll put you on their subscription video platform, but they don't want your content to be on TV anymore," he says. "So, we are trying to work with the TV nets to satisfy their needs and protect them and at the same time expand our business through all of the new digital platforms."

New content strategies Since leaving Warner Bros. Entertainment in 2011 to spearhead Henson's cross-platform global sales, Goldsmith and his team have been quick to sell to major digital players like Amazon, Netflix and Apple, and to a raft of international broadcasters, with a focus on European territories. In addition, Henson continues to leverage the power of Google with its new paid YouTube channel, Jim Henson Family TV, which most recently also launched on ad-free online platform Hulu Kids. It features popular Henson catalogue titles such as *Fraggle Rock*, *Mopatop's Shop* and *The Wubbulous World of Dr. Seuss*.

Henson's third-party licensing and distribution arm, HIP, has also been busy since taking on *Annoying Orange* as its first property in 2012. HIP recently sold the YouTube-spawned series to Teletoon (Canada), Cartoon Network (Latin America) and Tooniverse (South Korea), along with moving new mixed-media preschool series *Driftwood Bay* to European broadcasters including YLE (Finland), NRK (Norway) and SVT (Sweden).

But for as many deals as Henson has secured to support distribution growth, the one new market with the most potential has cooled of late. "Our biggest growth in sales is on digital platforms, particularly SVOD, but the euphoria of deal-making has really slowed down in the last six to nine months," says Goldsmith. "Eighteen months ago, we were doing one deal after another for really large sums of money. But because the large SVOD companies are now also focused on original content—as they should be—they've become much more selective as to the kinds of library content they want."

He adds that the creation of new SVOD and online ad-supported services has also slowed down and companies are taking a step back to re-evaluate their monetization strategies going forward.

Branching out But one media company with a keen eye on monetizing through ad support in the online video world is AwesomenessTV. Since launching its premium YouTube channel for tweens, teens and young adults in June 2012, the AwesomenessTV Network has amassed 73,000 YouTube channels, aggregating more than 20 million subscribers and 1.2 billion video views. Its numbers were so impressive that DreamWorks Animation came knocking in May and purchased the company for US\$33million—a move that speaks volumes about the rising value of youth-based digital content.

When questioned about the acquisition, AwesomenessTV founder Brian Robbins couldn't provide any specific details on how Awesomeness content might be packaged with the DreamWorks and Classic Media catalogues, or how



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he would develop a rumored DreamWorks-branded digital family channel using the studio's resources. He did say the alignment with DreamWorks will certainly strengthen the Awesomeness brand and help it target an even younger demographic. "If anything, the acquisition has given us more support and firepower to continue the course that we're on," says Robbins, which includes reaching a much wider audience outside of YouTube. "Interestingly, YouTube isn't asking for exclusivity anymore, which allows our content live everywhere," he says.

For example, one of its new series, half-hour sketch comedy show *AwesomenessTV*, debuted cable-first on Nickelodeon US in July as part of *AwesomenessTV*'s new co-development deal with the kidsnet. "The launch is a really interesting thing for us because we drove our YouTube audience to watch the show on Nick, and in turn, that drove traffic back to us. It was good for everybody," Robbins adds that new episodes of the show have been ordered, bringing the first season's total to 20. "These original episodes will keep us running through the end of the year and we'll be looking for international sales at MIPCOM," he says.

Despite the fact that *AwesomenessTV* gets more than 50 million unique visitors a month and new YouTube research shows it has the best teen engagement across all YouTube channels—including Nick, Disney, American Idol, Glee and Justin Bieber—Robbins says there is definitely room to grow in terms of advertising sales. "There are so many more ad

dollars at stake, and right now the digital dollars are still puny compared to TV dollars. As much success as we're having, there is still a long way to go, but we will get there."

Robbins is confident that he's on the right track. He says the company's unique approach to content that draws a very specific and engaged audience (primarily girls), combined with its ability to make branded content for partners like Clearasil that gets integrated into its programming, will push *AwesomenessTV* forward.

And he's not wrong. Creating points of differentiation for discoverability in a crowded market is one of the biggest challenges facing producers of new kids IP, says Vancouver-based digital media analyst Dennis Chenard. "The barriers to entry for getting content in the market have been lowered, but it is a challenge to stand out in the crowd," he says. "You still need to have a marketing push, and that's why creators of original IP are still playing with bigger networks and distributors that already have existing communities to promote the content."

The viral advantage No one knows this better than Sesame Workshop, which was one of the first kids companies to successfully embrace the potential audience of YouTube. Scott Chambers, SVP of worldwide media distribution, acknowledges that TV is still the bedrock of Sesame's programming strategy for reaching preschoolers and parents, but non-linear platforms are becoming increasingly important.



Workin' it—*Doozers* is the latest series to join Henson's roster and will head to traditional TV before moving to SVOD, where the company has been aggressive in locking up deals with majors like Netflix and Hulu

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"Our relationship with PBS, and what we do with our broadcast episodes, is first and foremost in our minds when we think about how to design educational media experiences for kids," says Chambers. "But all of the other platforms—from YouTube to iTunes to Netflix—have become very important for how we relate to our audience and how we program for, acquire and retain them."

Chambers says the biggest challenge for Sesame in parcelling out content across platforms is trying to cross-pollinate its employees' skills and expertise with the content.

"We have experts who can re-imagine content across different platforms or devices, like turning a static book into a touchable iPad experience. [The challenge is] trying to re-train ourselves to understand what all the platforms mean in terms of interactivity and engagement."

Sesame got a headstart on much of its competition eight years ago, when it began experimenting with multiplatform programming. "We were very fortunate that we had a magazine show format that was already somewhat cut up into short-form segments and clips, which enabled us to look at platforms like YouTube and offer viewers a different experience from our hour-long show," says Chambers.



AwesomenessTV Network has more than 20 million YouTube subscribers, but founder Brian Robbins admits there's a lot of room to grow with its ad-supported model

Today, *Sesame Street's* primary YouTube channel has more than 690,000 subscribers, and approximately 17,000 hours of Sesame programming are watched on YouTube alone every day. Sesame's downloadable content on iTunes, Google Play and Amazon has also been successful, according to Chambers. "It hasn't cannibalized our DVD business," he notes.

As for producing viral hits, Sesame has excelled. Cookie Monster's *Share It Maybe* YouTube video, in which the famous blue Muppet spoofed pop music hit "Call Me Maybe," was a particular standout, says Nadine Zylstra, Sesame SVP of production. "I remember the high of putting the clip up," she recalls. "Within the first two hours, we knew that something crazy was happening. We were trending on Twitter and we went viral in preschools and playgrounds. The clip has nearly 15 million views to date."

Sesame's latest digital experiment is its paid YouTube channel, which launched earlier this year. But the jury is still out on how well it—or any of the other new paid kids channels—are performing on the site. (Subscriber numbers aren't permitted to be disclosed, under the terms of the deals with YouTube.)

"It's in the early stages, but we're learning more about our YouTube audience every day," says Chambers. And from this September to next March, he says Sesame will roll out all of the short-form content (1,300 total clips, five new ones per week) made to support *Sesame Street's* latest season.

Over at Henson, Goldsmith says the company is taking baby steps while it continues to figure out whether or not Jim Henson Family TV should be a subscription service, solely ad-supported, or both. "We believe the bigger economic opportunity is ad-supported because we can't compete with Nick, Disney and Netflix with the amount of content that they have," he contends. "But we do want to give parents the option to pay a small fee to not have advertising." He adds that Henson plans to experiment with exclusive alternative content on the channel within the next year, with the eventual goal of producing original content for the platform. "But we are far away from being able to afford the same quality content that we produce for traditional TV," he admits. In the meantime, Henson aims to syndicate the channel on platforms around the world and has its eyes on Roku, Xbox and Playstation in the US as its next stops.

While YouTube continues with its pilot paid-channel project, AwesomenessTV's Robbins says he isn't sure whether or not the first wave of the video giant's subscription kids channels is working. "I think over time YouTube and SVOD will come together, but it doesn't seem like there is a lot of promotion behind it, and it seems like people are trying to move their audience to pay for their existing channels. It is a tough feat unless you're offering them something new and exciting," he says. "And you have to market it. I'm not sure what the dollar amount is that Netflix spends per subscriber acquisition, but it is a lot. You can't just launch into subscription without marketing it."

On the horizon For all the uncertainty surrounding the monetization of new digital platforms, kids media companies continue to adapt to the fast-moving multichannel environment. In July, AwesomenessTV soft-launched AwesomenessX, a new YouTube channel aimed to engage more boys, and plans are in the works to pump up the channel's program offering significantly over the next few months. Henson, meanwhile, launched new multiplatform preschool IP Chatter Zoo in August as a content-loaded app, marking the first time it's introduced a preschool property to consumers through digital channels ahead of TV. "This is the kind of content that does incredibly well on-demand because it's something a parent can access anytime they want it for their child," says Goldsmith. Henson has plans to develop the property for TV and expand the brand into toys and other consumer product categories like printed books in 2014. **K**

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BY LANA CASTLEMAN



preschool

The Day Henry Met?

Producer Wiggleywoo (Ireland)

Style 2D CelAction animation

Format 26 x five minutes

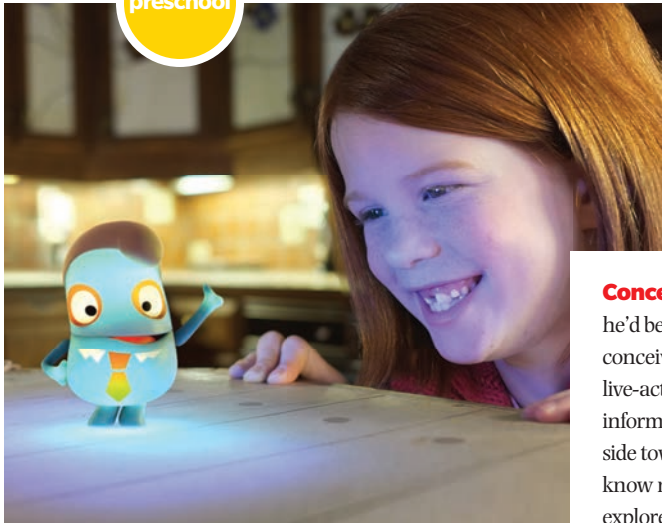
Budget US\$1.58 million

Status Year-old concept studio Wiggleywoo has a bible and 45-second test ready to go. A five-minute pilot should be in play for MIPCOM.

Delivery TBD

Concept Wiggleywoo creative director and co-founder Gilly (a.k.a. Gary Gill) took inspiration from his son, Henry, for this picture book-like preschool series. His toddler, you see, likes to say hello and goodbye to everyone—and everything—he meets, including the postman, the sun, the beach, you name it. So on-screen in each ep, you'll see Henry meeting someone or something and then getting the chance to explore that connection to encourage aspirational play and learning about real objects and occupations. One day, for example, Henry might say hello to an astronaut and get to discover what it is he or she does—maybe even taking an imaginary rocket trip to the moon along the way.

preschool



Glowbies

Producer Gallus Entertainment (Canada)

Style Mixed media

Format 26 x 11 minutes

Budget US\$275,000/half hour

Status In development, with a bible and full pilot completed. Canada's Brain Power Studio is on-board as the series' global distributor.

Delivery Spring 2015

Concept In his search to fully exploit an innovative CGI-lighting effect he'd been crafting, veteran animator and Gallus principal Donnie Anderson conceived the wee light-filled Glowbies. As a community living within a larger live-action human one, the animated Glowbies are creatures who process information as light and live in a lighthouse moored at the edge of a small sea-side town. The series focuses on four Glowbies who live by the motto "if they know more, they glow more," and set out on a new adventure in every ep to explore the human world, often with comedic results.

Toggle

Producer Beakus (London)

Style Mixed media

Format 52 x five minutes

Budget US\$2.8 million

Status With a full pilot and a prebuy from the UK's pre-eminent preschool net CBeebies in-hand, the series' distributor Union Media will be looking to shore up financing at MIPCOM.

Delivery 2015

Concept Designed to help preschoolers discover shapes and solve problems, this series sprang from an in-school project conducted by picture book illustrator Leigh Hodgkinson, who's also the wife of Steve Smith, owner of commercial animation studio Beakus. Essentially, she carted numerous pre-cut paper shapes into schools and challenged kids to create characters and stories from them. *Toggle* extends that concept by crafting a shape-based world where the characters use those forms to solve the problems they encounter. In the pilot, for example, we see the gang wanting to go for a picnic, but it's raining. Oh, whatever to do? They quickly realize they can assemble an elephant from the errant shapes that will blow those gloomy clouds away.

preschool



boys
6 to 11

Sonic Boom (working title)

Co-producers Sega of America (US), Genao Productions (France)

Style CGI animation

Format 52 x 11 minutes

Budget Estimated in the range of US\$400,000/half hour

Status Greenlit and in production with sales to Gulli and Canal J in France. Lagardere Entertainment Rights is handling distribution outside the US and Asia.

Delivery Summer 2014

Concept We're about to see classic video game character Sonic the Hedgehog like we've never seen him before. This new full-CGI series being overseen by Takashi Iizuka, the head of Sega's Sonic team in Japan and creative force behind the games, is a complete break from past series made in the 1990s and early 2000s. Set in a new segment of the Sonic universe, *Sonic Boom* is a character-driven comedy focused on wisecracking Sonic and his best friend/sidekick Tails as they battle their arch-nemesis, Dr. Eggman. In each ep, expect plenty of pyrotechnics, action, laughs—and just a soupçon of slapstick to get the younger end of the demo watching.

Manufacturing prices. Consumer transparency. Accelerating time lines. They are all conspiring to put a big kink in the licensor-licensee-retailer supply chain—and it may just be ready to snap.

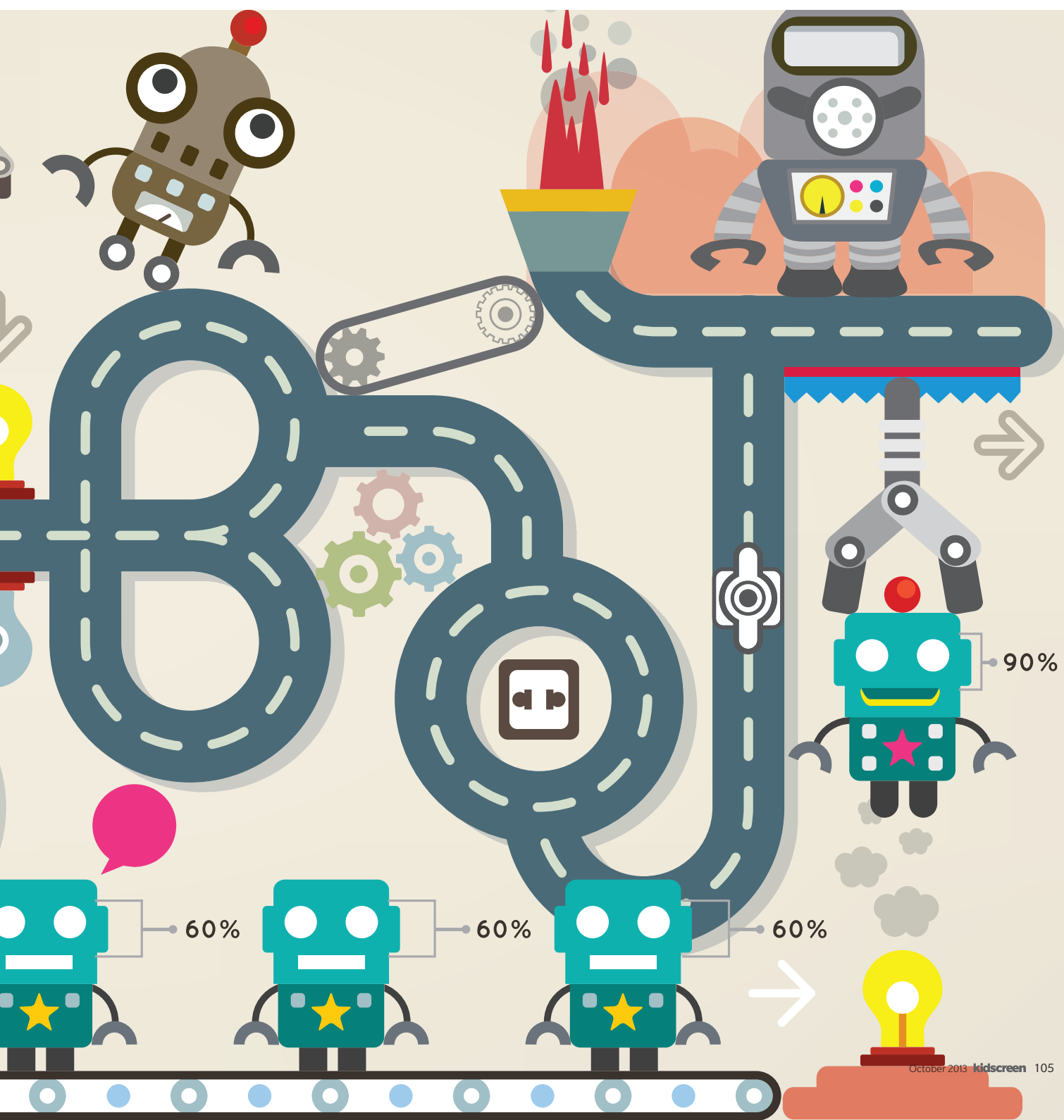
BY GARY RUSAK



The mounting pressure on the supply side of the consumer products chain is undeniable. As all tiers of retail continue to evolve, the complex relationships between licensors, licensees, manufacturers and buyers gets even more difficult to untangle. A recent string of high-profile manufacturing debacles in Southeast Asia have once again put the spotlight on the less-than-ideal conditions surrounding the modern production of mass-market goods earmarked for Western consumers. While licensors beef up their licensing agreements to protect themselves from consumer backlash, and licensees further invest in different forms of liability insur-

ance to mitigate their financial exposure, everyone along the line is entering a new era of consumer awareness that is testing the strength of each link in the chain. The big question, however, revolves around how mass retail's moves to alleviate current pressures will affect the consumer products business in general, and the toy industry specifically.

Welcome to the era of unprecedented visibility On November 24, 2012, the Tazreen Fashion Factory on the outskirts of Dhaka, Bangladesh, burned to the ground. At least 117 people were confirmed dead,





The April collapse of Rana Plaza in Bangladesh turned the spotlight on working conditions there, forcing an immediate, public response from Western licensors, retailers and manufacturers whose goods are produced in the country

and an estimated 200 more were injured. The public outcry over the shoddy working conditions in the apparel factory held the biggest kids entertainment licensor in the world, Disney, along with retailers and other licensors, to account. In March this year, Disney announced that it would cease production of any of its branded merchandise in Bangladesh. According to the *New York Times*, the company sent a letter to thousands of licensees and vendors detailing its new no-Bangladesh manufacturing policy.

Sadly, only a month after the company issued the letter, Rana Plaza (also located in a suburb outside of Dhaka) collapsed on April 24. This time, the death toll reached 1,129 and an estimated 2,500 workers were also seriously injured. While the Tazreen fire captured international attention, the scale of the Rana Plaza collapse started a public firestorm. In short order, there were protests in Bangladesh and an international outcry that got louder as consumers began connecting the dots between the conditions in the poor Southeast Asian country's low-wage factories and their production of goods for well-known brands and retailers in the Western world.

"The visibility and accountability are really unprecedented," says Carol Spieckerman, president of newmarketbuilders, a boutique retail consultancy firm based in Bentonville, Arkansas. "Any slip-ups go viral right away and there is a lot more pressure on everybody to make sure that these types of incidents don't happen again."

The now-ubiquitous nature of social media facilitated, perhaps for the first time, a serious discussion about one particular supply-side pressure that retailers, licensors and licensees now have to face. "Twenty years ago, people had two ways to get the news—maybe you picked up a paper in the morning, and then at night watched a half hour of news," says Jay Foreman, president and CEO of global sourcing and supply chain management company, The Bridge Direct. "Now, everyone has the news in their pockets at all times—it makes a difference."

Peter Lewis is the owner of Hong Kong-based Barter HK, a trading company that has more than 40 years of toy industry experience as an agent with expertise in the supply side. He says he's never seen retailers react so quickly to a factory issue as they did in April. "The names of the retailers were right out there," he says. "They had to act very swiftly,

and I can tell you that they did. Walmart right away said that you must register any plant with the local fire department, if you were going to do business with them."

Spieckerman says that the immediacy of the news created a new factor in the relationship between manufacturing facilities, licensors, licensees and retailers. "This is when everybody said, 'Boy, this can't be swept under the rug,'" she says. "With how much of an impact it had with social media, everyone involved knew that they couldn't afford to have something like that happen again."

So, not surprisingly, the pressure brought to bear by this increased consumer awareness is changing the game for the supply side of the consumer products equation. During the keynote panel at Licensing Show in June, Josh Silverman, EVP of global licensing at Disney Consumer Products, confirmed to an industry audience that the company is leaving Bangladesh entirely, as well as other trouble spots like Pakistan.

"We have to do what is in the best interest of our brand and our shareholders," he said. "We made a decision and we stand by it, and we will continue to stand by it."

Coping with pressure It isn't just major licensors that are feeling the heat of public scrutiny being heaped on the process of producing cheap goods for Western consumers weaned on bargain-basement prices. Appropriately, big retail conglomerates are also bearing the brunt of this particular supply-side pressure.

"Retailers and manufacturers have become more nimble and opportunistic in their sourcing," says Spieckerman, adding that many retailers have become adept at sourcing as direct-to-retail programs continue to grow. But this growth in DTR activity also serves to connect retailers' names directly with those much-publicized workplace tragedies.

"As they switch sourcing around the globe, they are creating more vulnerability because they have a shallower relationship with manufacturers," she says.

For instance, the Rana Plaza collapse was quickly connected to Joe Fresh apparel, a private-label brand developed by Canadian grocery giant Loblaw. The connection, again facilitated by social media, spurred the retailer to publicly address the issue and even offer compensation directly to those affected. UK-based retailer Primark followed suit. This was not a typical reaction on either of their parts. The fact that both retailers reacted publicly to openly address this issue—at all—signals a sea-change in the retail environment.

The old hand—the toy industry reacts There is no argument that the global toy biz—maker of arguably the largest retail category in the kids entertainment licensing business—has been ahead of the curve in terms of dealing with worker conditions around the world. It began putting regimens in place more than a decade ago to safeguard those who toil to make the toys that are eventually branded with names so familiar to consumers.

The impetus behind the International Council of Toy Industries' (ICTI) real action in this area was the Kader Toy

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Factory fire that occurred in Thailand on May 10, 1992. It killed 188 people and left more than 500 injured.

"At the time, it was every bit as big a story as the Bangladesh collapse," says Foreman. "The toy industry was tagged pretty badly."

The reaction from the toy industry led to the creation of the ICTI Care Process, a program that works to create tight industry-wide regulations to ensure safe working conditions. In 2004, the foundation set up its own inspections of factories, expressly to monitor compliance with building and fire safety standards.

"The impetus came from the Mattels, Hasbros and Legos of the world," says Frank Clarke, whose company Strategy XXI Partners provides the secretariat function for the ICTI Care Process. "They didn't want to have those bad working conditions. We were actually out ahead of this in 2004."

The organization has a technical advisory board comprised of a number of quality-control specialists from around the globe, and it has been pushing to unify manufacturing standards in the toy industry.

"We have a large number of brands, and most of the major retailers agreeing to only source from factories that

comply with our process," says Clarke. "That is why we haven't seen as much anxiety from retailers and brands in the toy category."

Currently, ICTI Care is working with the Chinese government on establishing a standard working week. Clarke's description of the process illustrates the incremental and transparent methods that ICTI uses to affect change. "In exchange for factories opening their books, we created a continuous improvement program where we gave factories a two-year timetable to reduce the work week to 72 hours. That was the first step. The second step was a 66-hour work week, and now we are seeing if we can get that down to 60."

Even Isaac Larian, founder of L.A.-based MGA Entertainment—and an often outspoken critic of the toy industry establishment—is quick to credit ICTI Care with serving the industry as a whole and creating a better environment for workers. "It is effective," he says. "But, of course, it has its flaws. If someone wants to be corrupt, they will find a way to be corrupt."

Foreman, who also sits on the board of directors for the Toy Industry Association (the North American member of ICTI), says the scrutiny that fell upon the toy industry a couple of decades ago has served it well, forcing its members to develop safeguards against future disasters. "A manufacturer of a toy that a child plays with is 100 times more regulated than that of a pair of shorts or t-shirts he or she wears," he says. "ICTI has been helpful from the standpoint of unifying the regimen."

There is, however, a hard cost to pay for the extra layer of protection enjoyed by the majority of the toy industry. "The burden is expensive," says Foreman. "You might be talking as high as 3% of the price of the product." That said, there is no price tag that can be put on the human toll that another disaster on the scale of Rana Plaza would take.

Shorter windows, higher expectations

Further complicating matters on the supply-side, and increasing the likelihood of sourcing issues, are shortening timelines and the ever-growing demands of retailers to get product on-shelf faster.

"It's been an issue as long as I've been in the toy industry," says Neil Friedman, former president of Toys 'R' Us and Mattel Brands, noting the constant push for retailers to get products in store on a shortened schedule.

Jay Foreman, CEO of The Bridge Direct, agrees that the retail window is constantly shortening, which has put pressure on the supply side of the equation. "Not only do they want quicker timelines. They also want to decrease the amount of inventory they will commit to upfront," he says.

Foreman contends that in this retail environment, one where a few major players call the shots, the tendency is for buyers to continue to apply more and more pressure on the suppliers. For instance, while their initial order might be smaller than it was previously, if an item "hits," buyers will want another shipment—pronto. "They are not only saying, 'Instead of six months, we are giving you four.' They are also saying, 'I just want a taste, and if it works, then you—as a manufacturer or agent—are going to have to react quickly.' Because those retailers are going to need a lot of inventory, and quick."

In order to meet these demands, Foreman says those at the front of the supply chain are assuming additional risk. "The reality is that if someone can deal with it, and services the retailers the way they want to be serviced, you have to be ready to finance some level of inventory," he says. "I have to build an inventory on spec. I have to stock computer chips and special materials—I have to have them on hand. If I'm lucky, I'll have them if the item takes off, but if I'm unlucky, I'm going to eat [the cost of] them. That is now just part of doing business. You roll the dice."

This phenomenon, perhaps more than any other, has added further menace to investing in new and unproven original licenses and potential movie-based franchises. It also serves to make whatever has a proven track record even more attractive to licensees. "If your licenses are more evergreen, it's just less risk," says Foreman. "If you do something new or trendy, it's a big risk." —Gary Rusak

Making it in America Perhaps the biggest and most publicized reaction to the recent spate of consumer and media outcry over outsourced production and related working conditions is Walmart's new Made in America campaign. Earlier this year, the biggest retailer in the world pledged to buy US\$50 billion in US-made goods over the next decade. Put in perspective, this dollar figure equals roughly 10% of Walmart's annual revenue.

To get the Made in America ball rolling, the retailer hosted a conference in Orlando, Florida for its suppliers in August. About 1,500 people attended the two-day meeting, including the head of General Electric, US Commerce Secretary Penny Pritzker and a number of state governors, as well as Walmart president and CEO Mike Duke, and Chairman and CEO of Walmart US, Bill Simon.

Interestingly, Spieckerman says the pledge is not an empty one. "When Walmart gets behind something, it changes the entire retail landscape," she says. "They mean they want to do US\$50 billion in US goods in a decade, and they will do it and track against it."

Of course, the Made in America push is being well-publicized by the company, with many millions being spent

on marketing to show its interest in bringing more employment to the US and cleaning up some of the more vulnerable parts of the supply chain.

However, Spieckerman says the pledge is more than just good PR. “Walmart rarely does something with just a singular benefit,” she says. “By bringing some manufacturing back to the US, it also allows Walmart to keep a closer eye on manufacturing itself.” She further asserts that Walmart has also promised “to keep prices in line,” and that the retailer has stated it won’t abide higher prices, driven by increased manufacturing cost, being passed on to consumers. She says the pressure will be placed back on suppliers to find the right economies of scale to make the new equation work.

“Retailers right now are concentrating on getting better at putting the right product in front of the right customer at the right time,” she says. “You have shorter lead times, same-day delivery, real-time models and flexible inventory—all these things are conspiring to make US manufacturing a more viable alternative.”

The challenge for retailers is to create value by making their inventory more productive, which would neutralize the eventual rise in manufacturing costs that result from more ethical and, in some cases, more local sourcing practices.

“If you can move the right goods to the right place to the customer who wants to buy it at full price, rather than having it sit on a rack somewhere with a clearance price—that starts to change everything,” says Spieckerman. “Retailers have all these tools now—robust data sets and the ability to slice data thinly and develop algorithms that ensure more productive inventory—so that will mitigate the cost/sell equation. It’s a balancing act.”

American playthings? While Walmart’s pledge grabbed headlines, there are some questions as to how meaningful the idea of Made in America will become to the toy sector, which outsourced the majority of production to China and Southeast Asia decades ago.

MGA’s Larian, for one, attended the Walmart summit and is a fervent supporter of the retailer’s new initiative. His company’s Little Tikes brand is currently the biggest toy manufacturer in the US, and its plant in Hudson, Ohio is the largest employer in the city, where it has been located since the 1970s. He says between 35% and 40% of his products are made in the US right now, but with a recent multi-million-dollar investment in tooling equipment, his aim is to bring that number up towards the 70% threshold.

“As manufacturers as a whole, we really have taken advantage of exploiting workers around the world,” he says. “It’s time we seriously look at that and make it better.” But Larian doesn’t expect others in the toy industry to follow his lead. “The big public toy companies go from quarter to quarter, and at first it’s going to cost them more to bring manufacturing to the US,” says Larian. “That will bring down their gross margins and bring down their stock. I don’t foresee other companies having the guts to do it.”

Barter HK’s Lewis agrees that the toy industry as a whole will unlikely be swayed by Walmart’s program because of



MGA Entertainment has retooled its Ohio-based Little Tikes factory with the goal of manufacturing up to 70% of its toys in the US

the efficiencies developed around manufacturing in China. “You do have some companies going to Thailand, Indonesia and Malaysia,” he says. “In places like Vietnam and Myanmar, the wages are cheap, but there is just no capability to ship. In China, you have everything you need.”

Foreman agrees that for the “foreseeable future,” China will remain—despite its emergence as a powerhouse economy with an exploding middle class—the primary place for toy manufacturing. “We’ll see it go inland and West, but it’s not going to go out,” he says. “As China enhances its infrastructure with more ports, railroads and highways, the lower productivity and inefficiency that will come with saving labor costs elsewhere won’t be worth it.”

Additionally, Lewis says the technical know-how that goes into making toys isn’t easily transferred, and moving it to the US is a proposition that won’t stand up to market forces. He contends that while less complex toys, like preschool-focused Little Tikes, can be made in America, it won’t work for the majority of products. “It’s not feasible to make a complex toy in the US,” he says. “You can’t take a toy that usually retails for US\$10 and sell it for US\$30 because it was made in the US. That just won’t work.”

Neil Friedman, former president of Toys ‘R’ Us and Mattel Brands, also agrees that while prices have gone up in China, the difference in cost still doesn’t make it worthwhile to move production. “It’s an ideal place because you have skilled labor and ICTI Care-certified factories—so it is an effective hub,” he says.

While Foreman applauds Walmart’s efforts, he warns against making short-sighted sourcing decisions. “It’s just not going to be practical in this industry,” he says. “If people in this industry try their hand at it, I’m afraid they are going to learn some very expensive lessons.”

That said, the toy industry can take comfort in the notion that while production/labor costs will increase in China, the long-term work of the ICTI Care Process, and the relative attentiveness of the Chinese government to workplace issues, will serve to protect both the workers and the retailers, licensees and licensors that make up the entire toy sector.

“China is on top of the whole human relations aspect and has been for years,” Foreman says, comparing it to other emerging manufacturing hubs. “They don’t need to exploit people.” **K**

Girl power rocks BLE



While licensors seem to be heeding retail's call for girl-centric IP, preschool and boys properties will round out the new offerings on the show floor at Olympia this month

BY AMANDA BURGESS

Lolirock

Property owner/licensor Marathon Media/Zodiak Kids France

Synopsis *Lolirock* (52 x 26 minutes) is an animated co-production from Marathon Media, Disney France and France TV. The series chronicles the musical path of teen Iris, whose life changes the day she joins girl band Lolirock and discovers her royal heritage—and a new world of music, mystery and magic. “This is our first new girls series in a long time,” says Patricia de Wilde, SVP of consumer products for Zodiak Kids in France. “We launched *Totally Spies!* 10 years ago, and a few years later, the trend for girls moved to live-action shows, led by Disney Channel. But you can carry comedy and fantasy in animation in ways that aren’t possible with live action.”

Licensing plans and launch Music will play a key role in the licensing program. “Music is not widely used in licensing these days. We’ve recorded five songs for the first season—a mix of Katy Perry and K-pop, so very appealing to our target,” says de Wilde. “We’ll use them to tease the show on YouTube pre-launch, and grow the band as a real band for young girls. We feel this is going to be an exciting and relatable angle for the show, so girls can really make it their own.” The show’s style guide has a strong fashion sense that de Wilde says is reminiscent of *Sailor Moon*, so apparel and accessories will be key drivers of the mass-focused program. With the series set to launch in 2014 in France, the first products are expected to hit shelves in spring 2015.

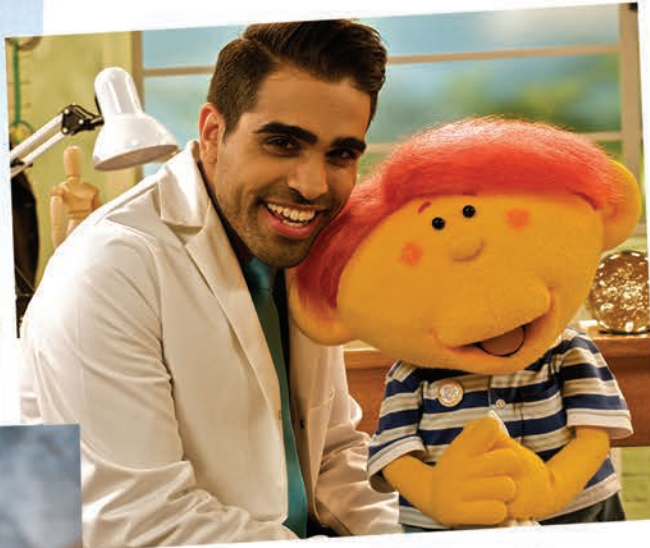
Current partners Master toy, publishing, interactive, gaming (all TBA)

Open categories Stationery, activity sets, apparel, accessories



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preschool girls



Driftwood Bay

Property owner/licensor Sixteen South Television/Henson Independent Properties

Synopsis *Driftwood Bay* (52 x seven minutes) is a mixed-media animated series that follows the adventures of five-year-old Lily, who lives on the cliffs of Scotland with her father, and finds inspiration in the everyday and unusual items she finds washed ashore. Currently in production, with episodes slated for delivery in spring 2014, the series has been sold to Nick UK, ABC Australia, MTV and YLE (Finland), NRK (Norway), SVT (Sweden) and HOP! (Israel). "We don't currently have a property aimed solely at girls, so Driftwood Bay is a great addition," notes Melissa Segal, EVP of global consumer products at HIP.

Licensing plans and launch "The series has a very beautiful, hand-cut, handmade look to it, so we'll bring that out in the licensing program," says Segal. With transmission beginning in summer 2014, Henson will roll out product beginning in 2015, with a focus on mass-market retailers.

Open categories Dolls, arts & crafts, activities and publishing

Kate & Mim-Mim

Property owner/licensor Nerd Corps Entertainment/FremantleMedia Kids & Family Entertainment

Synopsis Launching in 2014 on CBeebies in the UK, CGI-animated series *Kate & Mim-Mim* (52 x 11 minutes) follows the adventures of the spirited Kate, who travels to a fantasy world where her toy bunny Mim-Mim comes alive as a larger-than-life sidekick.

Licensing plans and launch "This is the first true girls IP that Fremantle has created—our other shows have traditionally been boys or gender-neutral," says Carl Lombard, head of global licensing for FremantleMedia Kids & Family Entertainment. "Kate is a bit of a tomboy. She's not totally sweet and cuddly—she's active and engaging. We believe there's quite a lot of sensational environments to stimulate play and creative expression, so we can even go to outdoor equipment and playsets." The key drivers of the licensing program will be toys—playsets, vehicles, dress-up, plush, play figures and accessories are slated for rollout in 2015. "The first UK wave will focus around toy retailers (Toys 'R' Us and specialists), mass supermarket grocers and catalogue retailers like Argos," says Lombard.

Open categories Toys, apparel, publishing, digital apps

preschool girls



Tilly and Friends

Property owner/licensor Walker Books

Synopsis Based on the picture books by Polly Dunbar, *Tilly and Friends* (52 x 11 minutes) is an animated series co-produced by Walker Books and JAM Media that premiered on CBeebies in the UK in September 2012. The series follows the adventures of Tilly and her five animal pals—Hector the pig, Tumpty the elephant, Doodle the crocodile, Tiptoe the rabbit, and Pru the chicken.

Licensing plans and launch "A focused UK consumer PR campaign will launch this autumn, with DVDs, magazines, TV tie-in publishing and a mobile app," says Anna Hewitt, head of licensing at Walker Books. "Apparel and toys will follow in 2014." The retail focus of the program will be on mid-tier and grocery.

Current partners Kidzation (toys), Blues Clothing (leisurewear), Aykroyd's & TDP (nightwear and essentials), Woodmansterne (greeting cards & giftwrap), Daredevil (gaming apps), eOne (DVD), Immediate Media (magazines), Walker Books (publishing)

Open categories Puzzles, games, accessories, stationery

preschool girls



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girls
5 to 10

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SOMETIMES BAD

Mimi & Bibi

Property owner/licensor Hoho Entertainment/Hoho Rights

Synopsis Mimi and Bibi is a new, stand-alone girls fashion brand from Hoho Rights that focuses on twin girls—sweet Mimi and rebel Bibi. “It forms part of our new strategy to work on brands that don’t necessarily sit on traditional broadcast platforms,” says Helen Howells, joint-MD of Hoho Rights. The twins already star in an interactive storytelling app for iPad.

Licensing plans and launch “We’ll be playing on the fun element of ‘opposites’ and using reversible techniques where possible to mirror whether girls are having a Mimi Day or a Bibi Day,” says Howells. The key driving categories of the phase-one licensing program, set for launch next spring, will be fashion, stationery, greeting cards and gifts.

Open categories Apparel, stationery, greeting cards, gifts

preschool



Toddler Time

Property owner/licensor The Creative Studio/Hoho Rights

Synopsis Toddler Time was first published by The Creative Studio as an interactive book called *Toddler Treasury*, and was quickly followed by *Toddler Christmas*. The books feature preschool twins Amy and Archie and sport contemporary artwork that combines bold colors with mixed patterns. The Toddler Time series has sold more than 240,000 copies in 16 languages, and will expand into a full series of new book formats that will launch in the UK, the US and other international markets within the next year.

Licensing plans and launch Retail focus will be on specialty, with drivers including high-end plush (ragdolls), puzzles, games, apparel and bedding.

Current partners Nosy Crow (publishing—launching spring 2014)

Open categories Plush, puzzles, games, apparel, bedding

kids
4 to 8



Jungle Bunch

Property owner/licensor Tat Productions/PGS Entertainment

Synopsis Based on a TV movie and interstitial series of the same name, *Jungle Bunch to the Rescue* is a new 52 x 11-minute animated series starring Maurice the Penguin (who thinks he’s a tiger) and his misfit jungle friends. The series has been sold worldwide to broadcasters including Super RTL (Germany), Teletoon (Canada), ABC Australia and Minimax (Eastern Europe). Universal is distributing the DVD in the US, the UK, France, Italy, Benelux and Australia. A theatrical movie is in the works for launch in 2016/2017.

Licensing plans and launch “We didn’t want to come out with product too soon as there was not enough exposure. We’re looking to provide four to five years of content for this franchise,” says Philippe Soutter, co-founder and president of PGS Entertainment. PGS will unveil a new style guide at BLE, and is looking to begin rolling out licensed product targeting mass for holiday 2014, with publishing and toys as key drivers.

Open categories Publishing, toys, back-to-school

kids
6 to 11

Tashi

Property owner/licensor Studio 100

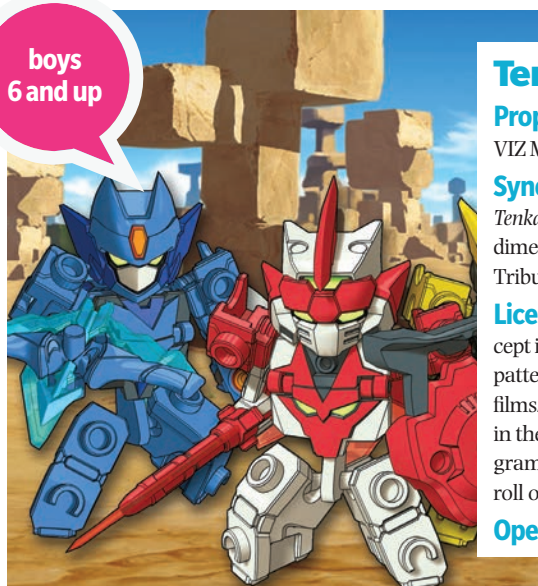
Synopsis Based on the Australian book series by Barbara and Anna Fienberg that has sold more than a million copies in over 20 countries worldwide, *Tashi* is a new action-adventure series that combines CGI and 2-D elements and tells the mystical tales of Jack's extraordinary cousin Tashi, a gnome-like character from a place far away.

Licensing plans and launch According to Marie-Laure Marchand, international licensing director for Studio 100, TV tie-in publishing will be the driving category for the licensing program at the outset, while retail efforts will focus on bookstores and mass-market outlets such as grocers.

Open categories Publishing



boys
6 and up



Tenkai Knights

Property owner/licensor Spin Master (North & South America), ShoPro (Asian territories), VIZ Media (EMEA)

Synopsis A co-production between ShoPro and Spin Master, animated action-adventure series *Tenkai Knights* follows Guren, Ceylan, Chooki and Toxxa, who accidentally stumble into an inter-dimensional portal and reemerge in another world as the legendary Tenkai Knights—Bravenwolf, Tributon, Lydendor and Valorn. The series launched on Cartoon Network US in August.

Licensing plans and launch Inspired by the toy line from Spin Master, the Tenkai Knights concept is toy-driven. "For the licensing program, we will draw on the show's collectibility and multi-play pattern—construction, transformation and combination," says Pascal Bonnet, EMEA director of films/TV sales & licensing at VIZ Media Europe. Spin Master's toys will hit the shelves of mass retailers in the US this fall, followed by Japan in spring 2014, and EMEA in fall 2014. The full US licensing program—encompassing publishing, apparel, accessories, domestics, party goods and electronics—will roll out next spring, followed by a European soft launch in Q4 and a full program in 2015.

Open categories Collectibles, apparel, publishing, soft goods, back-to-school, promotions

Moshi Karts

Property owner/licensor Mind Candy

Synopsis *Moshi Karts* is a new mobile title from Mind Candy, and a boy-focused extension of the Moshi Monsters franchise. "To date, Moshi Monsters has mostly sat in the girl aisle," says Darran Garnham, chief business development officer for Mind Candy in the UK. "Now we have something for the boys—and with 35% of Moshi's 85 million-plus accounts belonging to males, it's long overdue."

Licensing plans and launch "Moshi Karts has allowed our designers to go wild from a different, more male slant," says Garnham. "Expect eye-popping images, kick-ass machines and subtle yet powerful development on a well-tested mobile platform." Garnham says Mind Candy's retail flexibility and nimble approach is key to its success, and he will consider both limited and exclusive partnerships in the CP development of Moshi Karts. Expect toys and publishing to be key drivers for the licensing program that he hopes to launch in late 2014.

Open categories Entertainment, toys, publishing, apparel

boys
6 to 9



boys
4 to 8



Vic the Viking

Property Owner/licensor Studio 100

Synopsis Based on the book by Runar Jonsson, the original *Vic the Viking* enjoyed broadcast popularity worldwide in the 1970s. The new CGI series, produced by Studio 100 Animation and Flying Bark Productions, will air this fall in France (TF1), Belgium (Kidz RTL) and the Netherlands (Z@ppelin).

Licensing plans and launch “We are looking for a master toy partner in our territories apart from Germany/Austria/Switzerland (GAS), Spain and Portugal, as well as a publisher, apparel licensee, and game partners for science kits, outdoor and sporting goods,” says Marie-Laure Marchand, international licensing director for Studio 100. With a soft launch set for back-to-school 2014, the retail focus of the licensing program will be on toy specialists.

Current partners 60 licensees in GAS, with first products to be shown at Nuremberg Toy Fair in February 2014. Simba Dickie (master toy—GAS, Portugal and Spain).

Open categories Master toy (elsewhere), publishing, games, apparel

Jurassic World

Property owner/licensor Universal Partnership & Licensing

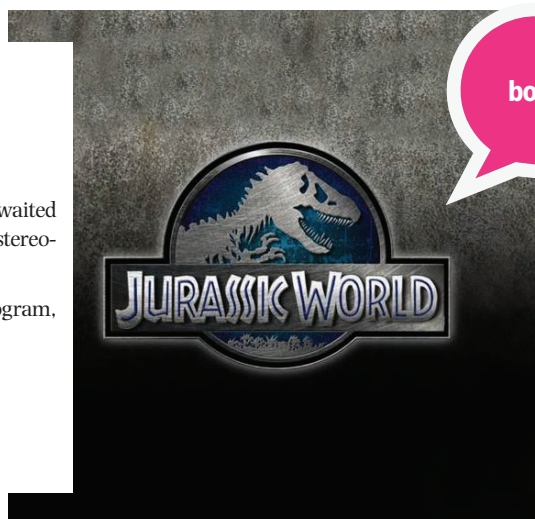
Synopsis Set for theatrical release in 2015, Steven Spielberg returns to produce the long-awaited next installment in the Jurassic Park franchise. Colin Trevorrow has signed on to direct the stereoscopic 3D action-adventure flick.

Licensing plans and launch Toys and apparel will be the key drivers of the licensing program, which will target all tiers of retail and launch in tandem with the release of the film globally.

Current partners Hasbro (global master toy)

Open categories All others

boys



preschool



Mister Maker

Property owner/licensor Zodiac Kids UK

Synopsis Long-running live-action arts and crafts series *Mister Maker* proves that anyone can be creative by demonstrating how easy and satisfying it is to transform everyday objects into fun pieces of art. With the aid of funny oversized props, a combination of live-action graphics and unique animation techniques, *Mister Maker* entertains mini-makers in a modern and fresh way.

Licensing program extensions “We plan to build on the success of the range from Creativity, the app sales (P2 Games’ *Mister Maker Let’s Make It* app, which went on-sale in August) and launch of the first book from Igloo in 2013, with lines from new partners in 2014,” says Jennifer Lawlor, SVP of consumer products for Zodiac Kids UK.

Current partners The Mister Maker program is well-established in the UK with licensees already on-board for arts & crafts, stationery, apparel, publishing, digital apps and live events. The licensing program expanded in 2013 into new markets, with partners signing on for key categories in Australia, South Africa and Turkey.

Open categories Zodiac is looking for licensees that can deliver a “creative or customization element to their product, in line with the values of *Mister Maker*,” says Lawlor.

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